



## **NOTICE OF SPECIAL COUNCIL MEETING**

In accordance with §38-431.01 of the Arizona Revised Statutes of the State of Arizona, notice is hereby given to the Members of City Council and to the general public that the Mayor and Council of the City of San Luis, Arizona, will hold a Special City Council meeting at 6:00 p.m., Wednesday, June 7, 2017. The meeting will take place at the City Council Chambers, located at 1090 E. Union Street, San Luis, Arizona, 85349. Everyone from the public is invited to attend the open meeting.

In accordance with the Americans with Disabilities Act (ADA) and Section 504 of the Rehabilitation Act of 1973, the City of San Luis does not discriminate on the basis of disability in the admission of or access to, or treatment of employment in its programs, activities, or services. For information regarding rights and provisions of the ADA or Section 504, or to request reasonable accommodations for participation in City programs, activities or services contact: ADA/Section 504 Coordinator, City of San Luis Human Resources Department, 1090 E. Union Street, San Luis, Arizona, 85349; (928) 341-8520.

Notice is hereby given that pursuant to A.R.S. §1-602.A.9, subject to certain specified statutory exceptions, parents have a right to consent before the State or any of its political subdivisions make a video or audio recording of a minor child. Meetings of the City Council are audio and/or video recorded, and, as a result, proceedings in which children are present may be subject to such recording. Parents in order to exercise their rights may either file written consent with the City Clerk to such recording, or take personal action to ensure that their child or children are not present when a recording may be made. If a child is present at the time a recording is made, the City will assume that the rights afforded parents pursuant to A.R.S. §1-602.A.9 have been waived.

THIS NOTICE IS GIVEN BY:

/s/ Sonia Cornelio, City Clerk

## **AVISO DE JUNTA ESPECIAL**

De acuerdo con los Estatutos del Estado de Arizona A.R.S. §38-431.01, se le informa a los miembros del Cabildo y al público en general que el Alcalde y el Cabildo, tendrán una Junta Especial a las 6:00 p.m., el día Miercoles 7 de Junio del 2017. La junta se llevará a cabo en la Sala del Cabildo, ubicada en el 1090 E. Union Street, San Luis, Arizona, 85349. El público está cordialmente invitado a la junta.

De acuerdo con el Acta de Americanos con Discapacidades y la Sección 504 del Acta de Rehabilitación del 1973, la Ciudad de San Luis, Arizona no discrimina por causa de discapacidad la admisión y acceso a sus programas, actividades, servicios o en el trato en cuanto a empleo. Para más información referente a derechos y provisiones del Acta de Americanos con Discapacidades o Sección 504, o para solicitar adaptaciones que sean razonables para la participación en programas, actividades o servicios de la Ciudad, contactar al: Coordinador del Acta de Americanos con Discapacidades/Sección 504, Departamento de Recursos Humanos de la Ciudad de San Luis, Arizona, ubicado en el 1090 E. Union Street, San Luis, Arizona, 85349; (928) 341-8520.

Por medio de este aviso y de acuerdo con los Estatutos del Estado de Arizona A.R.S §1-602.A.9, sujeto a ciertas excepciones reglamentarias, los padres de familia tienen el derecho de dar el consentimiento ante el Estado o cualquiera de sus subdivisiones políticas para hacer una grabación de audio o video de su hijo menor de edad. Las juntas del Cabildo se graban en audio y/o video y como resultado, el hecho de que haya menores presentes puede ser sujeto a que sean grabados. Para que los padres de familia puedan ejercer sus derechos pueden dar el consentimiento por escrito con la Secretaria de la Ciudad a tal grabación, o tomar acción personal para asegurarse que su hijo menor no esté presente cuando la grabación se lleve a cabo. Si un menor de edad está presente en el momento de la grabación, la Ciudad asumirá que los padres de familia están cediendo los derechos sobre una posible grabación de acuerdo con los Estatutos del Estado de Arizona A.R.S. §1-602.A.9.

ESTE AVISO ES DADO POR:

/f/ Sonia Cornelio, Actuaría de la Ciudad



**AGENDA**  
**Special Meeting**  
**San Luis City Council**  
**San Luis Council Chambers**  
**1090 E. Union Street**  
**San Luis, AZ 85349**  
**June 7, 2017**  
**6:00 p.m.**

**MEMBERS OF THE CITY COUNCIL WILL ATTEND EITHER IN PERSON, TELEPHONE, OR VIDEO CONFERENCE COMMUNICATION**

**PLEASE TAKE NOTICE: *The Mayor or Acting Mayor for this meeting may change the order of the items.***

***If authorized by law and by a majority vote of a quorum of City Council Members present, an executive session will be held immediately following the vote in accordance with A.R.S.***

***§38-431.03(A) and the meeting will be temporarily recessed while the Board retires to executive session which will not be open to the public.***

**1. CALL TO ORDER/ROLL CALL**

**2. PLEDGE OF ALLEGIANCE**

**3. DISCUSSION AND POSSIBLE ACTION ITEMS:**

**3. A.** Discussion and possible instruction to staff following a presentation on any and all matters regarding findings of the Economic Impact Analysis for the proposed Retail Tax Incentive Agreement with San Luis Commercial Holdings L.L.C for a multi-use commercial site. **(Jenny Torres, Community Development Director/Dan Jackson, Willdan Economist.com)**

**4. EXECUTIVE SESSION**

Vote to hold an Executive Session pursuant to A.R.S. §38-431.03(A)(3), (4) and (7)

Discussion and possible action to hold an Executive Session pursuant to A.R.S. §38-431.03(A)(3), (4) and (7) for discussion or consultation, for legal advice with the City Attorney or City Attorneys, and/or with the City Attorney of City's attorneys in order to consider its position and instruct its attorneys regarding City Council's position regarding contracts that are the subject of negotiations, and/or with designated representatives of City Council in order to consider its position and instruct its representatives regarding negotiations for the purchase, sale or lease of real property in relation to a Development Agreement with San Luis Commercial Holdings, L.L.C. **(Kay Marion Macuil, City Attorney; Bill Sims, Outside Counsel, Jenny Torres, Community Development Director; Ralph Velez, City Consultant)**

**5. MOTION TO GO BACK INTO SPECIAL SESSION**

**6. DISCUSSION AND POSSIBLE ACTION ITEMS:**

- 6. A.** Discussion and possible action on any and all matters regarding Resolution No. 1193. A resolution of the Mayor and City Council of the City of San Luis, Arizona approving a Development Agreement with San Luis Commercial Holdings, L.L.C., an Arizona limited liability company. **(Jenny Torres, Community Development Director)**
- 6. B.** Discussion and possible action to approve Resolution No. 1196. A resolution of the Mayor and City Council of the City of San Luis, Arizona adopting and directing the City Manager and/or his designee to follow the document titled "Classification Study and Final Report"; approving an appeal process; and providing for severability. **(Olivia Jenkins, Human Resources Director; Jennifer Ramos, CPS HR Consultant)**
- 6. C.** Discussion and possible action on any and all matters regarding instructions to staff to contract with Cooperative Personnel Services (CPS) HR Consulting for additional services not included in the initial contract to conduct a salary study and waiver of formal purchasing procedures as permitted under San Luis City Code Section 36.01(H). **(Olivia Jenkins, Human Resources Director)**
- 6. D.** Discussion and possible action on any and all matters regarding amending the Intergovernmental Agreement Council passed on April 12, 2017 and Resolution No. 1197. A Resolution of the Mayor and City Council of the City of San Luis, Arizona approving an Intergovernmental Agreement between the City of San Luis, Arizona and Gadsden Elementary School District No. 32 regarding improvements to address traffic and repealing Resolution No. 1188. **(Kay Marion Macuil, City Attorney and Eulogio Vera, Public Works Director)**

**7. ADJOURNMENT**



## AGENDA ITEM REVIEW FORM

### Special City Council Meeting

3.A.

**Meeting Date:** 06/07/2017

**Department Head:** Jenny Torres, Community Development Director, Community Development Department

**Submitted By:** Dania Castillo, Economic Development Assistant, Community Development Department

**Action Requested:** Discussion Item - No Action to be Taken

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#### ITEM:

Discussion and possible instruction to staff following a presentation on any and all matters regarding findings of the Economic Impact Analysis for the proposed Retail Tax Incentive Agreement with San Luis Commercial Holdings L.L.C for a multi-use commercial site. **(Jenny Torres, Community Development Director/Dan Jackson, Willdan Economist.com)**

#### SUMMARY:

Arizona Revised Statutes (A.R.S) §95-500.11 allows a municipality to enter into a "Retail Tax Incentive Agreement" where a developer may get credit for a portion of sales, use, or transaction privilege taxes payable to the City in connection with the construction, development, or operation of retail development activities as long as the proposed tax incentive is anticipated to raise more revenue than the amount of the incentive within the duration of the agreement. The statute states that a municipality shall verify the impact to the treasury by contracting with an independent third party before the City can enter into an agreement. Willdan Economist.com is the independent third party retained by the City of San Luis to evaluate the fiscal and economic benefits associated with the development of a multi-use commercial site by San Luis Commercial Holdings.

#### RECOMMENDATION / SUGGESTED MOTION:

Discussion and possible instruction to staff, no action.

#### Supporting information not attached to the Agenda Item Review Form:

N/A

**Document to be Recorded?:** No

N/A

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#### Fiscal Impact

<b>IS THERE FISCAL IMPACT ASSOCIATED WITH THIS ITEM:</b>	No
<b>CITY/STATE/FEDERAL FUNDS:</b>	N/A
<b>TOTAL:</b>	N/A
<b>BUDGETED AMOUNT:</b>	N/A
<b>AVAILABLE AMOUNT TO TRANSFER:</b>	N/A

**ACCT NAME & GL#/REMAINING BALANCE BEFORE PURCHASE: N/A**

**FISCAL IMPACT STATEMENT (IF THIS IS A BUDGET TRANSFER, YOU MUST ATTACH THE BUDGET ADJUSTMENT FORM):**

No fiscal impact associated with this item. This is presentation of the analysis only with discussion and possible instruction to staff only.

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**Attachments**

Economic Impact Report

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# City of San Luis, Arizona Economic Impact Analysis

## Proposed Retail Tax Incentive Agreement with San Luis Commercial Holdings, L.L.C. for Multi-Use Site

Prepared by:



5500 Democracy Drive, Suite 130 | Plano, Texas 75024

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Contact Person:

Dan V. Jackson, Vice President | Email: [djackson@willdan.com](mailto:djackson@willdan.com)

May 12, 2017

May 12, 2017

Ms. Jenny Torres  
Community Development Director  
City of San Luis  
1090 East Union St.  
San Luis, AZ 85349

**Re: Economic Impact Analysis – San Luis Commercial Holdings, L.L.C. Multi-Use Project Site**

Dear Ms. Torres:

Pursuant to our agreement with the City of San Luis (the City), **Willdan/Economists.com** is pleased to present herein the results of the Economic Impact Analysis of the San Luis Commercial Holdings, L.L.C. Multi-Use Site. This Letter Report summarizes our findings.

The Report is based on estimates, assumptions and other information related to the above. Such estimates, assumptions or other information were developed from prior research, knowledge of the industry and discussions with you and other involved parties, during which we were provided certain information. The sources of information and bases of estimates and assumptions are stated in the Report. Our documentation is based on estimates and assumptions which are inherently subject to uncertainty and variation depending upon evolving events.

Any conclusions and/or any prospective financial information that is included in our documentation were based on estimates and assumptions from previous studies, information developed from supplemental research, knowledge of the industry and other sources, including certain information that the City and/or developer provided. These sources of information and bases of significant estimates and assumptions are stated in our documentation. Some assumptions inevitably will not materialize and unanticipated events and circumstances may occur. Therefore, actual results achieved will vary from any estimates, and the variations may be material.

We extend our thanks and appreciation for the opportunity to be of service in this matter, and for the City's and its staff's valuable cooperation and assistance. If you have any questions, please do not hesitate to contact me at 972.378.6588 or [djackson@willdan.com](mailto:djackson@willdan.com).

Respectfully submitted,

**WILLDAN FINANCIAL SERVICES**



**Dan V. Jackson**  
**Vice President**

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## Schedules

Attachment A – Arizona Revised Statutes §9-500.11

## Introduction

**Willdan/Economists.com** was retained by the City of San Luis, Arizona (the “City”) to evaluate the fiscal and economic benefits associated with the development of a multi-use site by San Luis Commercial Holdings, L.L.C. (the “Developer”). The Developer is proposing to develop and maintain a multi-use hotel, restaurant, and convenience store/gas station on the site.

The proposed Project location will be a 5 to 8-acre site at the northwest corner of the intersection of Highway 95 and 22<sup>nd</sup> Street within the City’s limits (the “Project Site”). As identified in the Memorandum of Understanding (the “MOU”) between the City and the Developer, the Project Site is owned by MJS Properties, L.P. an Arizona limited partnership, and the acquisition of the Project Site by the Developer has yet to occur as of the date of this Report.

This Report identifies the estimated economic and fiscal impacts of the multi-use project at the Project Site. An Economic Impact Analysis examines the effect of a particular project on the economy in a specified area, ranging from a single neighborhood to the entire globe. It usually measures changes in business revenue, business profits, personal wages, and/or jobs.

A Fiscal Impact Analysis addresses the net impact on government of a particular project. This is done by estimating the increase in revenues to a municipality. For this Project, the estimated revenues that will be increased include a variety of taxes including, but not limited to, state income taxes, sales tax/transaction privilege tax, and utility fee revenues. **Schedules 4 and 5** of this Report present the different categories and estimated annual revenues for each.

## Background

As described in the MOU, the Developer intends to develop a “brand” hotel, a “brand” restaurant, a franchise convenience store and gas station, and other transaction privilege tax generating businesses on the Project Site. In addition to generating transaction privilege taxes directly to the City, these businesses will indirectly benefit the City by providing employment in a City with a historically high unemployment rate, enhance property values of nearby properties, and generate other economic development in the City limits. The Developer, to maximize its leverage and maximize use of its development funding for actual development of the site, as opposed to using those resources for land acquisition, desires to receive credit for the transaction privilege tax revenue being generated to the City from the developed Project Site for the cost to acquire the Project Site. Having an effective tax credit where excise privilege taxes being generated are used, in part, to acquire and develop the Project Site is a material part of the transaction to the Developer.

## Regulatory Requirements

Arizona Revised Statutes (A.R.S.) §9-500.11 allows a municipality to enter into a “retail tax incentive agreement” as that term is defined in that statute. By having an agreement or set of agreements which comply with the provisions of this statute, the Developer may get credit for a portion of the sales, use, or transaction privilege taxes payable to the City in connection with the construction, development, or operation of retail development activities on the Project Site by Developer or its nominee(s). According to A.R.S. §9-500.11 (D1): “... the proposed tax incentive is anticipated to raise more revenue than the amount of the incentive within the duration of the agreement.” The statute also states that “A city or town shall not enter into a retail tax incentive agreement if the proposed tax incentive raises less revenue than the amount of the incentive...The finding made pursuant to subsection D, paragraph 1 of this section shall be verified by an independent third party before the city or town enters into the retail development

*incentive agreement.*” (A.R.S. §9-500.11 (F, H)). A copy of A.R.S. §9-500.11 is included as **Attachment A** to this Letter Report.

Article 9 §7 of the Arizona Constitution prohibits any subdivision of the State giving or lending its credit or making any donation, grant, or subsidy to any person, association, or corporation. Arizona has recognized that if (i) the public treasury receives benefits that meet or exceed the cost to the public treasury and (ii) if the expenditure of public funds is for a public purpose, then there is consideration for the transaction and the matter is not in violation of this provision of law.

## Retail Tax Incentive Agreement

So that the City will, at all times, raise more revenue than the amount of the credit provided by the Retail Tax Incentive Agreement, based on discussions with City Staff and the City’s Legal Counsel it has been proposed that the Agreement will be structured as follows:

- A. Fifty percent (50%) of all transaction privilege taxes of the City as generated from businesses established on the Project Site will be rebated to Developer or its nominee or assignee until the sum of one million eight hundred and twenty-three thousand dollars (\$1,823,000.00) is paid.
- B. The Retail Tax Incentive Agreement will be conditioned upon the development of and the opening of the afore described “brand” hotel and “brand” restaurant on or before January 1, 2020.

## Economic Impact Analysis

### Methodology

To prepare the economic impact analysis, Willdan/Economists.com developed an impact model based upon certain inputs and assumptions, and utilizing appropriate local data sets. Based on our experience and knowledge of the industry, this model was developed to measure the impacts of development and many other activities that affect employment or expenditures in the economy.

Models such as this are particularly useful for measuring the total economic effects of a particular project or program, and yield estimates of the number and types of jobs created, the amount of wages associated with those jobs, and the total economic output or “final sales” generated within particular industries. This model relies upon economic “multipliers” that mathematically represent the relationship between the initial change in one sector of the economy and the corresponding effect of that change on other interdependent industry sectors, as well as the effect of that subsequent change on further sectors. These effects are commonly described as “direct,” “indirect,” and “induced” and are generally defined as follows:

- The “direct” effect is the initial change in economic activity from local payroll and construction expenditures in a specific industry or sector. For this Project, the direct effects to San Luis’s zip code are the wages and other expenditures at the site (and with City businesses), during both construction and operation of the proposed facility.
- The “indirect” effect results from industry-industry transactions required to support the direct activity. This effect is a measure of the change in the output of suppliers linked to the industry being evaluated. For example, construction will result in an increase in purchases of building materials, engineering and consulting services, and other goods from “business to business” suppliers within the City.
- The “induced” effect consists of employee spending in the City by employees, created by direct

and indirect impacts, spending their earnings on local goods and services, such as food, clothing, real estate, education, health services, etc.

The total economic impact of the project is typically the sum of the direct, indirect, and induced impacts, offset by any economic loss related to the change in the use of the land. For purposes of this analysis, Willdan/Economists.com has only included the direct labor effects in the overall return to the City.

It should be noted that this modeling generally assumes that demand for goods and services by industries or households increases in relation to an increase in income, and that an increase in demand results in a proportional increase in local supply and employment. This implies that local suppliers satisfy this initial demand by increasing their output and hiring additional workers rather than shifting their goods or services from one set of consumers to another. This assumption may not hold in areas with tight labor or capital markets since suppliers may find it difficult to obtain these labor or material inputs or other resources necessary to expand production. Considering the scale of the proposed project and the size of the economic study area, this is not likely to be a factor for this analysis.

### Assumptions and Inputs

- **Direct Labor.** The Project will create both construction related jobs and ongoing jobs once construction is complete. The anticipated construction related and ongoing jobs by facility were provided by the City and the Developer. Willdan/Economists.com allocated these anticipated jobs as director/supervisor positions (25%) and staff positions (75%) as detailed on **Schedule 1**.
- **Direct Payroll.** Using the labor categories identified by both the Developer and the allocation between director/supervisor and staff positions, Willdan/Economists.com assigned an hourly labor cost to each anticipated labor category associated with the businesses on the Project Site. The hourly wage estimates were obtained from the Yuma MSA-2015 Occupational Employment & Hourly Wage Estimates, prepared by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, May 2016. The hourly wage rates were adjusted for inflation to the start of the projection period. The anticipated monthly payroll was then calculated based on the total staffing levels and anticipated hourly wages. This analysis is detailed on **Schedule 1**.
- Willdan/Economists.com projected that 70% of the jobs associated with the development of the Project Site and 80% of the jobs associated with the ongoing operations of the businesses at the Project Site would be local residents who currently reside within the San Luis City limits or would relocate within the City Limits. The resulting local direct labor and local direct payroll are identified on **Schedule 2**.
- Payroll costs are assumed to increase at 2.5 percent (2.5%) annually due to inflation and merit adjustments.
- Construction is estimated to take approximately 21 months.

### Summary of Economic Impacts

The anticipated Project is forecast to be the source of substantial economic benefits over the projection period. The total anticipated labor and associated payroll is shown below on **Table 1** as summarized **Schedule 2**.

**Table 1  
Summary of Economic Benefits**

Description	Labor Impacts	Annual Payroll Impacts (Rounded)
<b>Construction Related Jobs</b>		
Hotel	47.60	\$ 2,262,600
Restaurant	11.20	532,400
Convenience Store / Gas Station	10.50	507,000
<b>Total Construction Related Jobs</b>	<b>69.30</b>	<b>\$ 3,302,000</b>
<b>Ongoing Jobs</b>		
Hotel	13.60	\$ 380,600
Restaurant	11.20	364,500
Convenience Store / Gas Station	12.00	327,800
<b>Total Ongoing Jobs</b>	<b>36.80</b>	<b>\$ 1,072,900</b>

Notes: (1) Does not include inflationary impacts on wages.

## Fiscal Impact Analysis

### Methodology

The analysis of fiscal impacts focuses on the potential public revenues generated from utility services, transaction privilege taxes and the City's share of taxes including state income taxes. For purposes of this analysis, only those revenues to the City are included.

This analysis concentrates on direct and indirect impacts. While there are several levels of indirect impacts from projects such as this, the analysis focuses on the indirect impacts including, but not limited to the City's share of the state income tax and transaction privilege tax revenue.

The direct fiscal benefits consist of utility fees and tax revenues generated by the construction and operation of the proposed businesses on the Project Site. Indirect fiscal benefits include public revenues generated by direct payroll such as state income and transaction privilege tax revenues.

### Assumptions and Inputs

- **Projected Revenues Subject to Transaction Privilege Tax.** Revenue projections for the hotel, restaurant, and convenience store/gas station have been estimated by the Developer based on industry averages. The revenues are phased in over the first part of the projection period and include an annual inflationary adjustment of 2.0 percent (2.0%). The projected revenues are detailed on **Schedule 3**.
- As discussed previously, the agreement is expected to provide a credit of transaction privilege taxes

of 50 percent (50%) of the annual liability of the businesses located on the Project Site until a total of \$1.823 million credit has been received. **Schedule 3** presents the anticipated annual transaction privilege tax credit.

- Construction is expected to take approximately 21 months.
- Estimated construction costs have been provided by the City and the developer. Anticipated Transaction Privilege Taxes on the Construction portion of the project are estimated as follows:

Description	Amount
<b>Construction Costs</b>	
Hotel	\$ 7,106,056.00
Restaurant	1,600,000.00
Convenience Store / Gas Station	1,700,000.00
<b>Total Construction Costs</b>	<b>\$ 10,406,056.00</b>
<b>Amount Allocated to Purchases within the City</b>	<b>\$ 3,642,119.60</b>
<b>Total Projected Transaction Privilege Tax (Rounded)</b>	<b>\$ 145,700.00</b>
Allocated to Year 1	109,300.00
Allocated to Year 2	36,400.00

- **Utility System Revenues.** The City will receive water and wastewater revenue from the businesses on the project site. Based on our experience with the water and wastewater industry, we have developed flow projections based on the business type and size. Additionally, we have used the City's current utility system rates to project monthly and annual water and wastewater revenue from the project site. The annual water and wastewater rates are expected to be increased annually at 2.0 percent (2.0%). Detailed Utility System revenue projections are shown on **Schedule 4**.
- **City Share of State Income Taxes.** Willdan/Economists.com has assumed approximately 1.775 percent (1.775%) of every direct payroll dollar will be credited to the City by the State for State Income Tax.
- **In City Spending.** Willdan/Economists.com has projected that approximately 25% of payroll will be spent on goods and services within the City that are subject to the transaction privilege tax. It is assumed these expenditures will be at businesses other than those on the proposed project site.
- **Transaction Privilege Tax Rate.** The transaction privilege tax rate included in the projections is 4.0 percent (4.0%). This rate is assumed throughout the projection period.

### Summary of Fiscal Impacts

The results of the Fiscal Impacts Analysis are shown on **Schedules 5 and 6**. These projections are based on the assumptions discussed in the previous sections. In order for the City to move forward with the Project, the proposed tax incentive must provide more revenue to the City than the tax incentive. As can be seen on **Schedule 6**, the total projected revenues exceed the anticipated tax credit by over 196%.

It is anticipated that it will take approximately 15 years from the beginning of construction to reach the \$1.823 million tax credit cap. Over that period, the cumulative projected direct payroll anticipated is \$24,392,800.

**Schedule 6** presents the anticipated Tax Credit as well as the projected sources of income to the City provided by this project over the projection period. As summarized from **Schedule 6** and shown on **Table 2** below, the net benefit to the City over the projection period is anticipated to be \$1,755,700.

**Table 2**  
**Summary Projected Fiscal Benefits**

Description	Amount
<b>TRANSACTION PRIVILEGE TAX CREDIT</b>	<b>\$ (1,823,000)</b>
<b>PROJECTED SOURCES OF REVENUE</b>	
Transaction Privilege Taxes Paid	\$ 2,170,900
Utility System Revenue	730,900
Payroll Revenue Impacts	<u>676,900</u>
<b>TOTAL PROJECTED SOURCES OF REVENUE</b>	<b>\$ 3,578,700</b>
<b>NET BENEFIT TO CITY OVER PROJECTION PERIOD</b>	<b>\$ 1,755,700</b>

# Schedules

**Schedule 1**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Direct Labor and Payroll Assumptions**

Labor Classification	Total (1)	Director/ Supervisor	Staff
		FTEs	FTEs
<b>JOBS</b>			
<b>Construction Related Jobs</b>			
Hotel	68.00	17.00	51.00
Restaurant	16.00	4.00	12.00
Convenience Store / Gas Station	15.00	4.00	11.00
<b>Total Construction Related Jobs</b>	<b>99.00</b>	<b>25.00</b>	<b>74.00</b>
<b>Ongoing Jobs</b>			
Hotel	17.00	4.00	13.00
Restaurant	14.00	4.00	11.00
Convenience Store / Gas Station	15.00	4.00	11.00
<b>Total Ongoing Jobs</b>	<b>46.00</b>	<b>12.00</b>	<b>35.00</b>
<b>HOURS PER MONTH</b>			
<b>Construction Related Jobs</b>			
Hotel	10,880.00	2,720.00	8,160.00
Restaurant	2,560.00	640.00	1,920.00
Convenience Store / Gas Station	2,400.00	640.00	1,760.00
<b>Total Construction Related Jobs - Hours Per Month</b>	<b>15,840.00</b>	<b>4,000.00</b>	<b>11,840.00</b>
<b>Ongoing Jobs</b>			
Hotel	2,720.00	640.00	2,080.00
Restaurant	2,400.00	640.00	1,760.00
Convenience Store / Gas Station	2,400.00	640.00	1,760.00
<b>Total Ongoing Jobs - Hours Per Month</b>	<b>7,520.00</b>	<b>1,920.00</b>	<b>5,600.00</b>

**Schedule 1**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Direct Labor and Payroll Assumptions**

Labor Classification	Total (1)	Director/ Supervisor	Staff
		FTEs	FTEs
<b>EFFECTIVE HOURLY RATE (2)</b>			
<b>Construction Related Jobs</b>			
Hotel		\$ 42.39	\$ 18.88
Restaurant		\$ 42.39	\$ 18.88
Convenience Store / Gas Station		\$ 42.39	\$ 18.88
<b>Ongoing Jobs</b>			
Hotel		\$ 30.64	\$ 9.63
Restaurant		\$ 30.07	\$ 10.64
Convenience Store / Gas Station		\$ 25.88	\$ 9.99
<b>MONTHLY PAYROLL</b>			
<b>Construction Related Jobs</b>			
Hotel	\$ 269,361.60	\$ 115,300.80	\$ 154,060.80
Restaurant	63,379.20	27,129.60	36,249.60
Convenience Store / Gas Station	60,358.40	27,129.60	33,228.80
<b>Total Construction Related Jobs - Monthly Payroll</b>	<b>\$ 393,099.20</b>	<b>\$ 169,560.00</b>	<b>\$ 223,539.20</b>
<b>Ongoing Jobs</b>			
Hotel	\$ 39,640.00	\$ 19,609.60	\$ 20,030.40
Restaurant	37,971.20	19,244.80	18,726.40
Convenience Store / Gas Station	34,145.60	16,563.20	17,582.40
<b>Total Ongoing Jobs - Monthly Payroll</b>	<b>\$ 111,756.80</b>	<b>\$ 55,417.60</b>	<b>\$ 56,339.20</b>

Notes:

- (1) Total Direct Jobs As provided by the Developer and City of San Luis.
- (2) Yuma MSA-2015 Occupational Employment & Hourly Wage Estimates. Prepared by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, May 2016 (Mean Wage). Adjusted for Inflation.

**Schedule 2**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Direct Labor and Payroll Summary**

Labor Classification	Total	% Local	Amount Local
<b>JOBS</b>			
<b>Construction Related Jobs</b>			
Hotel	68.00	70%	47.60
Restaurant	16.00	70%	11.20
Convenience Store / Gas Station	15.00	70%	10.50
<b>Total Construction Related Jobs</b>	<b>99.00</b>		<b>69.30</b>
<b>Ongoing Jobs</b>			
Hotel	17.00	80%	13.60
Restaurant	14.00	80%	11.20
Convenience Store / Gas Station	15.00	80%	12.00
<b>Total Ongoing Jobs</b>	<b>46.00</b>		<b>36.80</b>
<b>MONTHLY PAYROLL</b>			
<b>Construction Related Jobs</b>			
Hotel	\$ 269,361.60	70%	\$ 188,553.12
Restaurant	63,379.20	70%	44,365.44
Convenience Store / Gas Station	60,358.40	70%	42,250.88
<b>Total Construction Related Jobs - Monthly Payroll</b>	<b>\$ 393,099.20</b>		<b>\$ 275,169.44</b>
<b>Ongoing Jobs</b>			
Hotel	\$ 39,640.00	80%	\$ 31,712.00
Restaurant	37,971.20	80%	30,376.96
Convenience Store / Gas Station	34,145.60	80%	27,316.48
<b>Total Ongoing Jobs - Monthly Payroll</b>	<b>\$ 111,756.80</b>		<b>\$ 89,405.44</b>

**Schedule 3**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Projected Revenues and Transaction Privilege Tax Credit**

Description	Construction	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2017	2018	2019	2020	2021	2022	2023	2024
<b>Projected Revenues Subject to Transaction Privilege Tax (1)</b>								
Hotel	(2)	\$ 446,800	\$ 893,500	\$ 1,367,100	\$ 1,787,000	\$ 1,822,700	\$ 1,859,200	\$ 1,896,400
Restaurant	(2)	520,000	1,040,000	1,591,200	2,080,000	2,121,600	2,164,000	2,207,300
Convenience Store / Gas Station	(2)	644,400	1,288,800	1,971,800	2,577,500	2,629,100	2,681,600	2,735,300
<b>Total Projected Revenues</b>		\$ 1,611,200	\$ 3,222,300	\$ 4,930,100	\$ 6,444,500	\$ 6,573,400	\$ 6,704,800	\$ 6,839,000
<b>Transaction Privilege Tax Revenue @ 4%</b>								
Hotel	(2)	\$ 17,900	\$ 35,700	\$ 54,700	\$ 71,500	\$ 72,900	\$ 74,400	\$ 75,900
Restaurant	(2)	\$ 20,800	\$ 41,600	\$ 63,600	\$ 83,200	\$ 84,900	\$ 86,600	\$ 88,300
Convenience Store / Gas Station	(2)	25,800	51,600	78,900	103,100	105,200	107,300	109,400
<b>Total Transaction Privilege Tax Revenue @ 4%</b>		\$ 64,500	\$ 128,900	\$ 197,200	\$ 257,800	\$ 263,000	\$ 268,300	\$ 273,600
<b>Proposed Tax Credit</b>								
Annual Percent		50%	50%	50%	50%	50%	50%	50%
Dollar Amount		\$ 32,300	\$ 64,500	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,200	\$ 136,800
<b>Cumulative Tax Credit</b>		\$ 32,300	\$ 96,800	\$ 195,400	\$ 324,300	\$ 455,800	\$ 590,000	\$ 726,800

**Notes:**

- (1) Based on Information Provided by the Developer and City of San Luis.
- (2) Construction Projected to last approximately 21 months.

**Schedule 3**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Projected Revenues and Transaction Privilege Tax Credit**

Description	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2025	2026	2027	2028	2029	2030	2031	2032
<b>Projected Revenues Subject to Transaction Privilege Tax (1)</b>								
Hotel	\$ 1,934,300	\$ 1,973,000	\$ 2,012,500	\$ 2,052,700	\$ 2,093,800	\$ 2,135,600	\$ 2,178,300	\$ 2,221,900
Restaurant	2,251,500	2,296,500	2,342,400	2,389,300	2,437,100	2,485,800	2,535,500	2,586,200
Convenience Store / Gas Station	2,790,000	2,845,800	2,902,700	2,960,700	3,020,000	3,080,400	3,142,000	3,204,800
<b>Total Projected Revenues</b>	<b>\$ 6,975,800</b>	<b>\$ 7,115,300</b>	<b>\$ 7,257,600</b>	<b>\$ 7,402,700</b>	<b>\$ 7,550,900</b>	<b>\$ 7,701,800</b>	<b>\$ 7,855,800</b>	<b>\$ 8,012,900</b>
<b>Transaction Privilege Tax Revenue @ 4%</b>								
Hotel	\$ 77,400	\$ 78,900	\$ 80,500	\$ 82,100	\$ 83,800	\$ 85,400	\$ 87,100	\$ 88,900
Restaurant	\$ 90,100	\$ 91,900	\$ 93,700	\$ 95,600	\$ 97,500	\$ 99,400	\$ 101,400	\$ 103,400
Convenience Store / Gas Station	111,600	113,800	116,100	118,400	120,800	123,200	125,700	128,200
<b>Total Transaction Privilege Tax Revenue @ 4%</b>	<b>\$ 279,100</b>	<b>\$ 284,600</b>	<b>\$ 290,300</b>	<b>\$ 296,100</b>	<b>\$ 302,100</b>	<b>\$ 308,000</b>	<b>\$ 314,200</b>	<b>\$ 320,500</b>
<b>Proposed Tax Credit</b>								
Annual Percent	50%	50%	50%	50%	50%	50%	50%	50%
Dollar Amount	\$ 139,600	\$ 142,300	\$ 145,200	\$ 148,100	\$ 151,100	\$ 154,000	\$ 157,100	\$ 58,800
<b>Cumulative Tax Credit</b>	<b>\$ 866,400</b>	<b>\$ 1,008,700</b>	<b>\$ 1,153,900</b>	<b>\$ 1,302,000</b>	<b>\$ 1,453,100</b>	<b>\$ 1,607,100</b>	<b>\$ 1,764,200</b>	<b>\$ 1,823,000</b>

**Schedule 4**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Fiscal Impact Assumptions**

Description	Construction	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2017	2018	2019	2020	2021	2022	2023	2024
<b>UTILITY SYSTEM REVENUE ASSUMPTIONS</b>								
<b>Hotel</b>								
Water								
Monthly Usage (Gallons)		200,000	280,000	370,000	400,000	400,000	400,000	400,000
Base Charge - 4" Meter (Includes 2,000 gallons usage)	\$	1,376.54	\$ 1,404.07	\$ 1,432.15	\$ 1,460.80	\$ 1,490.01	\$ 1,519.81	\$ 1,550.21
Volume Charge Per Thousand Gallons	\$	2.56	\$ 2.61	\$ 2.66	\$ 2.72	\$ 2.77	\$ 2.83	\$ 2.88
Total Volume Charge	\$	506.88	\$ 725.91	\$ 980.14	\$ 1,081.24	\$ 1,102.87	\$ 1,124.93	\$ 1,147.42
<b>Total Monthly Bill - Water</b>	<b>\$</b>	<b>1,883.42</b>	<b>\$ 2,129.98</b>	<b>\$ 2,412.29</b>	<b>\$ 2,542.04</b>	<b>\$ 2,592.88</b>	<b>\$ 2,644.74</b>	<b>\$ 2,697.63</b>
Wastewater								
Base Charge	\$	24.02	\$ 24.50	\$ 24.99	\$ 25.49	\$ 26.00	\$ 26.52	\$ 27.05
Volume Charge Per Thousand Gallons	\$	2.42	\$ 2.47	\$ 2.52	\$ 2.57	\$ 2.62	\$ 2.67	\$ 2.73
Total Volume Charge	\$	484.00	\$ 691.15	\$ 931.57	\$ 1,027.25	\$ 1,047.79	\$ 1,068.75	\$ 1,090.13
<b>Total Monthly Bill - Wastewater</b>	<b>\$</b>	<b>508.02</b>	<b>\$ 715.65</b>	<b>\$ 956.56</b>	<b>\$ 1,052.74</b>	<b>\$ 1,073.79</b>	<b>\$ 1,095.27</b>	<b>\$ 1,117.18</b>
<b>Restaurant</b>								
Water								
Monthly Usage (Gallons)		18,000	22,000	28,000	30,000	30,000	30,000	30,000
Base Charge - 1" Meter (Includes 2,000 gallons usage)	\$	57.47	\$ 58.62	\$ 59.79	\$ 60.99	\$ 62.21	\$ 63.45	\$ 64.72
Volume Charge Per Thousand Gallons	\$	2.56	\$ 2.61	\$ 2.66	\$ 2.72	\$ 2.77	\$ 2.83	\$ 2.88
Total Volume Charge	\$	40.96	\$ 52.22	\$ 69.25	\$ 76.07	\$ 77.59	\$ 79.14	\$ 80.72
<b>Total Monthly Bill - Water</b>	<b>\$</b>	<b>98.43</b>	<b>\$ 110.84</b>	<b>\$ 129.04</b>	<b>\$ 137.06</b>	<b>\$ 139.80</b>	<b>\$ 142.59</b>	<b>\$ 145.44</b>
Wastewater								
Base Charge	\$	24.02	\$ 24.50	\$ 24.99	\$ 25.49	\$ 26.00	\$ 26.52	\$ 27.05
Volume Charge Per Thousand Gallons	\$	2.42	\$ 2.47	\$ 2.52	\$ 2.57	\$ 2.62	\$ 2.67	\$ 2.73
Total Volume Charge	\$	43.56	\$ 54.30	\$ 70.50	\$ 77.04	\$ 78.58	\$ 80.16	\$ 81.76
<b>Total Monthly Bill - Wastewater</b>	<b>\$</b>	<b>67.58</b>	<b>\$ 78.81</b>	<b>\$ 95.49</b>	<b>\$ 102.53</b>	<b>\$ 104.58</b>	<b>\$ 106.68</b>	<b>\$ 108.81</b>
<b>Convenience Store / Gas Station</b>								
Water								
Monthly Usage (Gallons)		5,000	7,000	10,000	12,500	12,500	12,500	12,500
Base Charge - 1" Meter (Includes 2,000 gallons usage)	\$	57.47	\$ 58.62	\$ 59.79	\$ 60.99	\$ 62.21	\$ 63.45	\$ 64.72
Volume Charge Per Thousand Gallons	\$	2.56	\$ 2.61	\$ 2.66	\$ 2.72	\$ 2.77	\$ 2.83	\$ 2.88
Total Volume Charge	\$	7.68	\$ 13.06	\$ 21.31	\$ 28.53	\$ 29.10	\$ 29.68	\$ 30.27
<b>Total Monthly Bill - Water</b>	<b>\$</b>	<b>65.15</b>	<b>\$ 71.68</b>	<b>\$ 81.10</b>	<b>\$ 89.51</b>	<b>\$ 91.30</b>	<b>\$ 93.13</b>	<b>\$ 94.99</b>

**Schedule 4**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Fiscal Impact Assumptions**

Description	Construction	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2017	2018	2019	2020	2021	2022	2023	2024
<b>Wastewater</b>								
Base Charge	\$	24.02	\$ 24.50	\$ 24.99	\$ 25.49	\$ 26.00	\$ 26.52	\$ 27.05
Volume Charge Per Thousand Gallons	\$	2.42	\$ 2.47	\$ 2.52	\$ 2.57	\$ 2.62	\$ 2.67	\$ 2.73
Total Volume Charge	\$	12.10	\$ 17.28	\$ 25.18	\$ 32.10	\$ 32.74	\$ 33.40	\$ 34.07
<b>Total Monthly Bill - Wastewater</b>	<b>\$</b>	<b>36.12</b>	<b>\$ 41.78</b>	<b>\$ 50.17</b>	<b>\$ 57.59</b>	<b>\$ 58.74</b>	<b>\$ 59.92</b>	<b>\$ 61.12</b>
<b>PAYROLL CONVERSION FACTOR</b>								
City Share of State Shared Revenue		<b>0.01775</b>						
Percent of Payroll Dollar Used for In City Purchases		<b>0.25000</b>						
Transaction Privilege Tax Rate		<b>0.04000</b>						
Additional Transaction Privilege Tax Revenue		<u>0.01000</u>						
Total Payroll Conversion Factor		0.02775						

**Schedule 4**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Fiscal Impact Assumptions**

Description	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2025	2026	2027	2028	2029	2030	2031	2032
<b>UTILITY SYSTEM REVENUE ASSUMPTIONS</b>								
<b>Hotel</b>								
Water								
Monthly Usage (Gallons)	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000
Base Charge - 4" Meter (Includes 2,000 gallons usage)	\$ 1,581.21	\$ 1,612.84	\$ 1,645.09	\$ 1,677.99	\$ 1,711.55	\$ 1,745.79	\$ 1,780.70	\$ 1,816.32
Volume Charge Per Thousand Gallons	\$ 2.94	\$ 3.00	\$ 3.06	\$ 3.12	\$ 3.18	\$ 3.25	\$ 3.31	\$ 3.38
Total Volume Charge	\$ 1,170.37	\$ 1,193.78	\$ 1,217.66	\$ 1,242.01	\$ 1,266.85	\$ 1,292.19	\$ 1,318.03	\$ 1,344.39
<b>Total Monthly Bill - Water</b>	<b>\$ 2,751.58</b>	<b>\$ 2,806.62</b>	<b>\$ 2,862.75</b>	<b>\$ 2,920.00</b>	<b>\$ 2,978.40</b>	<b>\$ 3,037.97</b>	<b>\$ 3,098.73</b>	<b>\$ 3,160.71</b>
Wastewater								
Base Charge	\$ 27.59	\$ 28.14	\$ 28.71	\$ 29.28	\$ 29.87	\$ 30.46	\$ 31.07	\$ 31.69
Volume Charge Per Thousand Gallons	\$ 2.78	\$ 2.84	\$ 2.89	\$ 2.95	\$ 3.01	\$ 3.07	\$ 3.13	\$ 3.19
Total Volume Charge	\$ 1,111.93	\$ 1,134.17	\$ 1,156.85	\$ 1,179.99	\$ 1,203.59	\$ 1,227.66	\$ 1,252.21	\$ 1,277.26
<b>Total Monthly Bill - Wastewater</b>	<b>\$ 1,139.52</b>	<b>\$ 1,162.31</b>	<b>\$ 1,185.56</b>	<b>\$ 1,209.27</b>	<b>\$ 1,233.45</b>	<b>\$ 1,258.12</b>	<b>\$ 1,283.28</b>	<b>\$ 1,308.95</b>
<b>Restaurant</b>								
Water								
Monthly Usage (Gallons)	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000
Base Charge - 1" Meter (Includes 2,000 gallons usage)	\$ 66.01	\$ 67.34	\$ 68.68	\$ 70.06	\$ 71.46	\$ 72.89	\$ 74.34	\$ 75.83
Volume Charge Per Thousand Gallons	\$ 2.94	\$ 3.00	\$ 3.06	\$ 3.12	\$ 3.18	\$ 3.25	\$ 3.31	\$ 3.38
Total Volume Charge	\$ 82.34	\$ 83.98	\$ 85.66	\$ 87.38	\$ 89.13	\$ 90.91	\$ 92.73	\$ 94.58
<b>Total Monthly Bill - Water</b>	<b>\$ 148.35</b>	<b>\$ 151.32</b>	<b>\$ 154.35</b>	<b>\$ 157.43</b>	<b>\$ 160.58</b>	<b>\$ 163.79</b>	<b>\$ 167.07</b>	<b>\$ 170.41</b>
Wastewater								
Base Charge	\$ 27.59	\$ 28.14	\$ 28.71	\$ 29.28	\$ 29.87	\$ 30.46	\$ 31.07	\$ 31.69
Volume Charge Per Thousand Gallons	\$ 2.78	\$ 2.84	\$ 2.89	\$ 2.95	\$ 3.01	\$ 3.07	\$ 3.13	\$ 3.19
Total Volume Charge	\$ 83.39	\$ 85.06	\$ 86.76	\$ 88.50	\$ 90.27	\$ 92.07	\$ 93.92	\$ 95.79
<b>Total Monthly Bill - Wastewater</b>	<b>\$ 110.99</b>	<b>\$ 113.21</b>	<b>\$ 115.47</b>	<b>\$ 117.78</b>	<b>\$ 120.13</b>	<b>\$ 122.54</b>	<b>\$ 124.99</b>	<b>\$ 127.49</b>
<b>Convenience Store / Gas Station</b>								
Water								
Monthly Usage (Gallons)	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500
Base Charge - 1" Meter (Includes 2,000 gallons usage)	\$ 66.01	\$ 67.34	\$ 68.68	\$ 70.06	\$ 71.46	\$ 72.89	\$ 74.34	\$ 75.83
Volume Charge Per Thousand Gallons	\$ 2.94	\$ 3.00	\$ 3.06	\$ 3.12	\$ 3.18	\$ 3.25	\$ 3.31	\$ 3.38
Total Volume Charge	\$ 30.88	\$ 31.49	\$ 32.12	\$ 32.77	\$ 33.42	\$ 34.09	\$ 34.77	\$ 35.47
<b>Total Monthly Bill - Water</b>	<b>\$ 96.89</b>	<b>\$ 98.83</b>	<b>\$ 100.81</b>	<b>\$ 102.82</b>	<b>\$ 104.88</b>	<b>\$ 106.98</b>	<b>\$ 109.12</b>	<b>\$ 111.30</b>

**Schedule 4**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Fiscal Impact Assumptions**

Description	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2025	2026	2027	2028	2029	2030	2031	2032
<b>Wastewater</b>								
Base Charge	\$ 27.59	\$ 28.14	\$ 28.71	\$ 29.28	\$ 29.87	\$ 30.46	\$ 31.07	\$ 31.69
Volume Charge Per Thousand Gallons	\$ 2.78	\$ 2.84	\$ 2.89	\$ 2.95	\$ 3.01	\$ 3.07	\$ 3.13	\$ 3.19
Total Volume Charge	\$ 34.75	\$ 35.44	\$ 36.15	\$ 36.87	\$ 37.61	\$ 38.36	\$ 39.13	\$ 39.91
<b>Total Monthly Bill - Wastewater</b>	<b>\$ 62.34</b>	<b>\$ 63.59</b>	<b>\$ 64.86</b>	<b>\$ 66.15</b>	<b>\$ 67.48</b>	<b>\$ 68.83</b>	<b>\$ 70.20</b>	<b>\$ 71.61</b>

**Schedule 5**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Fiscal Impact Details**

Description	Construction	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2017	2018	2019	2020	2021	2022	2023	2024
<b>TRANSACTION PRIVILEGE TAXES</b>								
Transaction Privilege Taxes on Construction Materials	\$ 109,300	\$ 36,400	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Transaction Privilege Taxes	(1) \$ 64,500	\$ 128,900	\$ 197,200	\$ 257,800	\$ 263,000	\$ 268,300	\$ 273,600	
Less: Proposed Tax Credit	(1) 32,300	64,500	98,600	128,900	131,500	134,200	136,800	
Transaction Privilege Tax Revenues Paid	\$ 32,200	\$ 64,400	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,100	\$ 136,800	
Total Transaction Privilege Taxed Paid	\$ 109,300	\$ 68,600	\$ 64,400	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,100	\$ 136,800
<b>UTILITY SYSTEM REVENUES</b>								
Water								
Hotel	(1) \$ 5,700	\$ 25,600	\$ 28,900	\$ 30,500	\$ 31,100	\$ 31,700	\$ 32,400	
Restaurant	(1) 300	1,300	1,500	1,600	1,700	1,700	1,700	
Convenience Store / Gas Station	(1) 200	900	1,000	1,100	1,100	1,100	1,100	
Total Water	\$ 6,200	\$ 27,800	\$ 31,400	\$ 33,200	\$ 33,900	\$ 34,500	\$ 35,200	
Wastewater								
Hotel	(1) \$ 1,500	\$ 8,600	\$ 11,500	\$ 12,600	\$ 12,900	\$ 13,100	\$ 13,400	
Restaurant	(1) 200	900	1,100	1,200	1,300	1,300	1,300	
Convenience Store / Gas Station	(1) 100	500	600	700	700	700	700	
Total Wastewater	\$ 1,800	\$ 10,000	\$ 13,200	\$ 14,500	\$ 14,900	\$ 15,100	\$ 15,400	
<b>Total Utility System Revenues</b>	<b>(1) \$ 8,000</b>	<b>\$ 37,800</b>	<b>\$ 44,600</b>	<b>\$ 47,700</b>	<b>\$ 48,800</b>	<b>\$ 49,600</b>	<b>\$ 50,600</b>	
<b>TAX CREDIT ANALYSIS</b>								
Proposed Tax Credit	(1) \$ 32,300	\$ 64,500	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,200	\$ 136,800	
Less:								
Transaction Privilege Taxes Paid	(1) 32,200	64,400	98,600	128,900	131,500	134,100	136,800	
Utility System Revenues	(1) 8,000	37,800	44,600	47,700	48,800	49,600	50,600	
Remaining Revenue to be Recovered	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Payroll Conversion Factor	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775
Minimum Additional Payroll Needed (in City)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Direct Demand Factor	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Additional Direct Payroll Needed								
Annual	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Cumulative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Direct Payroll Anticipated								
Annual	\$ 3,302,400	\$ 2,703,800	\$ 901,400	\$ 1,154,400	\$ 1,183,200	\$ 1,213,200	\$ 1,243,200	\$ 1,274,400
Cumulative	\$ 3,302,400	\$ 6,006,200	\$ 6,907,600	\$ 8,062,000	\$ 9,245,200	\$ 10,458,400	\$ 11,701,600	\$ 12,976,000

Notes:

(1) Construction Projected to last approximately 21 months.

**Schedule 5**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Fiscal Impact Details**

Description	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2025	2026	2027	2028	2029	2030	2031	2032
<b>TRANSACTION PRIVILEGE TAXES</b>								
Transaction Privilege Taxes on Construction Materials	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Transaction Privilege Taxes	\$ 279,100	\$ 284,600	\$ 290,300	\$ 296,100	\$ 302,100	\$ 308,000	\$ 314,200	\$ 320,500
Less: Proposed Tax Credit	139,600	142,300	145,200	148,100	151,100	154,000	157,100	58,800
Transaction Privilege Tax Revenues Paid	\$ 139,500	\$ 142,300	\$ 145,100	\$ 148,000	\$ 151,000	\$ 154,000	\$ 157,100	\$ 261,700
Total Transaction Privilege Taxed Paid	\$ 139,500	\$ 142,300	\$ 145,100	\$ 148,000	\$ 151,000	\$ 154,000	\$ 157,100	\$ 261,700
<b>UTILITY SYSTEM REVENUES</b>								
Water								
Hotel	\$ 33,000	\$ 33,700	\$ 34,400	\$ 35,000	\$ 35,700	\$ 36,500	\$ 37,200	\$ 37,900
Restaurant	1,800	1,800	1,900	1,900	1,900	2,000	2,000	2,000
Convenience Store / Gas Station	1,200	1,200	1,200	1,200	1,300	1,300	1,300	1,300
Total Water	\$ 36,000	\$ 36,700	\$ 37,500	\$ 38,100	\$ 38,900	\$ 39,800	\$ 40,500	\$ 41,200
Wastewater								
Hotel	\$ 13,700	\$ 13,900	\$ 14,200	\$ 14,500	\$ 14,800	\$ 15,100	\$ 15,400	\$ 15,700
Restaurant	1,300	1,400	1,400	1,400	1,400	1,500	1,500	1,500
Convenience Store / Gas Station	700	800	800	800	800	800	800	900
Total Wastewater	\$ 15,700	\$ 16,100	\$ 16,400	\$ 16,700	\$ 17,000	\$ 17,400	\$ 17,700	\$ 18,100
<b>Total Utility System Revenues</b>	<b>\$ 51,700</b>	<b>\$ 52,800</b>	<b>\$ 53,900</b>	<b>\$ 54,800</b>	<b>\$ 55,900</b>	<b>\$ 57,200</b>	<b>\$ 58,200</b>	<b>\$ 59,300</b>
<b>TAX CREDIT ANALYSIS</b>								
Proposed Tax Credit	\$ 139,600	\$ 142,300	\$ 145,200	\$ 148,100	\$ 151,100	\$ 154,000	\$ 157,100	\$ 58,800
Less:								
Transaction Privilege Taxes Paid	139,500	142,300	145,100	148,000	151,000	154,000	157,100	261,700
Utility System Revenues	51,700	52,800	53,900	54,800	55,900	57,200	58,200	59,300
Remaining Revenue to be Recovered	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Payroll Conversion Factor	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775
Minimum Additional Payroll Needed (in City)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Direct Demand Factor	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
<b>Additional Direct Payroll Needed</b>								
Annual	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Cumulative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Direct Payroll Anticipated</b>								
Annual	\$ 1,306,800	\$ 1,339,200	\$ 1,372,800	\$ 1,407,600	\$ 1,442,400	\$ 1,478,400	\$ 1,515,600	\$ 1,554,000
Cumulative	\$ 14,282,800	\$ 15,622,000	\$ 16,994,800	\$ 18,402,400	\$ 19,844,800	\$ 21,323,200	\$ 22,838,800	\$ 24,392,800

**Schedule 6**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Projected Fiscal Impacts**

Description	Construction	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2017	2018	2019	2020	2021	2022	2023	2024
<b>PROJECTED TRANSACTION PRIVILEGE TAXES CREDIT (1)</b>								
Annual	\$ -	\$ 32,300	\$ 64,500	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,200	\$ 136,800
<b>Cumulative</b>	<b>\$ -</b>	<b>\$ 32,300</b>	<b>\$ 96,800</b>	<b>\$ 195,400</b>	<b>\$ 324,300</b>	<b>\$ 455,800</b>	<b>\$ 590,000</b>	<b>\$ 726,800</b>
<b>PROJECTED SOURCES OF REVENUE</b>								
Transaction Privilege Taxes Paid								
From Construction Purchases	\$ 109,300	\$ 36,400	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
From Businesses On Site (1)	\$ -	\$ 32,200	\$ 64,400	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,100	\$ 136,800
Total Annual	\$ 109,300	\$ 68,600	\$ 64,400	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,100	\$ 136,800
<b>Cumulative</b>	<b>\$ 109,300</b>	<b>\$ 177,900</b>	<b>\$ 242,300</b>	<b>\$ 340,900</b>	<b>\$ 469,800</b>	<b>\$ 601,300</b>	<b>\$ 735,400</b>	<b>\$ 872,200</b>
Utility System Revenue								
Annual	\$ -	\$ 8,000	\$ 37,800	\$ 44,600	\$ 47,700	\$ 48,800	\$ 49,600	\$ 50,600
<b>Cumulative</b>	<b>\$ -</b>	<b>\$ 8,000</b>	<b>\$ 45,800</b>	<b>\$ 90,400</b>	<b>\$ 138,100</b>	<b>\$ 186,900</b>	<b>\$ 236,500</b>	<b>\$ 287,100</b>
Payroll Revenue Impacts								
Annual Direct Payroll	\$ 3,302,400	\$ 2,703,800	\$ 901,400	\$ 1,154,400	\$ 1,183,200	\$ 1,213,200	\$ 1,243,200	\$ 1,274,400
Direct Demand Factor	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Payroll Conversion Factor (2)	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775
Total Revenue Payroll Impacts								
Annual	\$ 91,600	\$ 75,000	\$ 25,000	\$ 32,000	\$ 32,800	\$ 33,700	\$ 34,500	\$ 35,400
<b>Cumulative</b>	<b>\$ 91,600</b>	<b>\$ 166,600</b>	<b>\$ 191,600</b>	<b>\$ 223,600</b>	<b>\$ 256,400</b>	<b>\$ 290,100</b>	<b>\$ 324,600</b>	<b>\$ 360,000</b>
<b>TOTAL PROJECTED SOURCES OF REVENUE</b>								
Annual	\$ 200,900	\$ 151,600	\$ 127,200	\$ 175,200	\$ 209,400	\$ 214,000	\$ 218,200	\$ 222,800
<b>Cumulative</b>	<b>\$ 200,900</b>	<b>\$ 352,500</b>	<b>\$ 479,700</b>	<b>\$ 654,900</b>	<b>\$ 864,300</b>	<b>\$ 1,078,300</b>	<b>\$ 1,296,500</b>	<b>\$ 1,519,300</b>

Notes:

- (1) Assumes 50% credit of annual transaction privilege taxes due.
- (2) Includes City's share of additional State Tax as well as Transaction Privilege Taxes from additional consumer spending.

**Schedule 6**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Projected Fiscal Impacts**

Description	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2025	2026	2027	2028	2029	2030	2031	2032
<b>PROJECTED TRANSACTION PRIVILEGE TAXES CREDIT (1)</b>								
Annual	\$ 139,600	\$ 142,300	\$ 145,200	\$ 148,100	\$ 151,100	\$ 154,000	\$ 157,100	\$ 58,800
<b>Cumulative</b>	<b>\$ 866,400</b>	<b>\$ 1,008,700</b>	<b>\$ 1,153,900</b>	<b>\$ 1,302,000</b>	<b>\$ 1,453,100</b>	<b>\$ 1,607,100</b>	<b>\$ 1,764,200</b>	<b>\$ 1,823,000</b>
<b>PROJECTED SOURCES OF REVENUE</b>								
Transaction Privilege Taxes Paid								
From Construction Purchases	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
From Businesses On Site (1)	\$ 139,500	\$ 142,300	\$ 145,100	\$ 148,000	\$ 151,000	\$ 154,000	\$ 157,100	\$ 261,700
Total Annual	\$ 139,500	\$ 142,300	\$ 145,100	\$ 148,000	\$ 151,000	\$ 154,000	\$ 157,100	\$ 261,700
<b>Cumulative</b>	<b>\$ 1,011,700</b>	<b>\$ 1,154,000</b>	<b>\$ 1,299,100</b>	<b>\$ 1,447,100</b>	<b>\$ 1,598,100</b>	<b>\$ 1,752,100</b>	<b>\$ 1,909,200</b>	<b>\$ 2,170,900</b>
Utility System Revenue								
Annual	\$ 51,700	\$ 52,800	\$ 53,900	\$ 54,800	\$ 55,900	\$ 57,200	\$ 58,200	\$ 59,300
<b>Cumulative</b>	<b>\$ 338,800</b>	<b>\$ 391,600</b>	<b>\$ 445,500</b>	<b>\$ 500,300</b>	<b>\$ 556,200</b>	<b>\$ 613,400</b>	<b>\$ 671,600</b>	<b>\$ 730,900</b>
Payroll Revenue Impacts								
Annual Direct Payroll	\$ 1,306,800	\$ 1,339,200	\$ 1,372,800	\$ 1,407,600	\$ 1,442,400	\$ 1,478,400	\$ 1,515,600	\$ 1,554,000
Direct Demand Factor	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Payroll Conversion Factor (2)	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775
Total Revenue Payroll Impacts								
Annual	\$ 36,300	\$ 37,200	\$ 38,100	\$ 39,100	\$ 40,000	\$ 41,000	\$ 42,100	\$ 43,100
<b>Cumulative</b>	<b>\$ 396,300</b>	<b>\$ 433,500</b>	<b>\$ 471,600</b>	<b>\$ 510,700</b>	<b>\$ 550,700</b>	<b>\$ 591,700</b>	<b>\$ 633,800</b>	<b>\$ 676,900</b>
<b>TOTAL PROJECTED SOURCES OF REVENUE</b>								
Annual	\$ 227,500	\$ 232,300	\$ 237,100	\$ 241,900	\$ 246,900	\$ 252,200	\$ 257,400	\$ 364,100
<b>Cumulative</b>	<b>\$ 1,746,800</b>	<b>\$ 1,979,100</b>	<b>\$ 2,216,200</b>	<b>\$ 2,458,100</b>	<b>\$ 2,705,000</b>	<b>\$ 2,957,200</b>	<b>\$ 3,214,600</b>	<b>\$ 3,578,700</b>

# Attachment A

9-500.11. Expenditures for economic development; requirements; definitions

(L05, Ch. 200, sec. 1)

A. In addition to any other powers granted to a city or town, the governing body of a city or town may appropriate and spend public monies for and in connection with economic development activities.

B. To fund economic development activities under this section, a city or town subject to the requirements of section 9-500.06 shall not impose a new fee or tax on a single specific industry or type of business.

C. Notwithstanding section 19-142, subsection B, a decision by the governing body involving an expenditure pursuant to this section shall not be enacted as an emergency measure and that decision is not effective for at least thirty days after final approval of the expenditure.

D. Before entering into a retail development tax incentive agreement, a city or town shall make a finding by a simple majority vote of the governing body without the use of consent calendar that includes both of the following:

1. That the proposed tax incentive is anticipated to raise more revenue than the amount of the incentive within the duration of the agreement.

2. That in the absence of a tax incentive, the retail business facility or similar retail business facility would not locate in the city or town in the same time, place or manner.

E. A city or town located in or within twenty-five miles of the exterior boundary of a metropolitan statistical area having a population of more than two million persons shall make a finding pursuant to subsection D of this section, by a two-thirds vote of the governing body.

F. A city or town shall not enter into a retail tax incentive agreement if the proposed tax incentive raises less revenue than the amount of the incentive.

G. A city or town shall present a status report of the revenues and expenses associated with the tax incentive every two years for the duration of the agreement in a public meeting.

H. The finding made pursuant to subsection D, paragraph 1 of this section shall be verified by an independent third party before the city or town enters into the retail development incentive agreement.

I. The adoption of the retail development tax incentive agreement shall be approved by a simple majority vote of the governing body without the use of consent calendar. For a city or town located in or within twenty-five miles of the exterior boundary of a metropolitan statistical area having a population of more than two million persons, the adoption of a retail development tax incentive agreement shall be approved by an affirmative vote of at least two-thirds of the governing body without the use of consent calendar.

J. A person or business entity receiving the retail development tax incentive agreement shall not finance the independent third party verification of the findings or have input into the selection of the independent third party verifying the findings.

K. A city or town shall adopt a notice of intent to enter into a retail development tax incentive agreement at least fourteen days before approving a retail development tax incentive agreement.

L. Subsection D of this section does not apply to tax incentives given to a business entity in an area that is designated by a city or town as a redevelopment project as defined in section 36-1471.

M. For the purposes of this section:

1. "Economic development activities" means any project, assistance, undertaking, program or study, whether within or outside the boundaries of the city or town, including acquisition, improvement, redevelopment, leasing or conveyance of improved or unimproved real or personal property or other activity, that the governing body of the city or town has found and determined will assist in the creation or retention of jobs or will otherwise improve or enhance the economic welfare of the inhabitants of the city or town.

2. "Expenditure" includes any waiver, exemption, deduction, credit, rebate, discount, deferral or other abatement or reduction of the normal municipal tax liability that otherwise applies to similar existing business entities and properties in that city or town, however denominated, computed or applied, and that is generally understood as an inducement to locate a business facility or other operation in the city or town.

3. "Metropolitan statistical area" means a geographical area consisting of cities, towns and other populated areas defined for federal statistical and census purposes by the United States office of management and budget with technical assistance from the United States bureau of the census.

4. "Retail" means the sale of tangible personal property, except the sale of tangible personal property to a person who is engaged in the business of selling such property.

5. "Retail development activities" means those economic development activities that involve the acquisition, improvement, leasing or conveyance of improved or unimproved real or personal property or other activity to facilitate the sale of goods at retail, including the sale of automobiles, or to facilitate other activities, including theater and restaurant development, that generate revenues that are subject to municipal transaction privilege taxation.

6. "Retail development tax incentive agreement" means an agreement between a city or town and a person engaged in or planning to engage in retail development activities within that city or town in which the city or town agrees to pay, refund, credit, rebate or otherwise provide to that person all or a portion of the sales, use or transaction privilege taxes payable to that city or town in connection with the construction, development or operation of the retail development activities.



## AGENDA ITEM REVIEW FORM

### Special City Council Meeting

4.

**Meeting Date:** 06/07/2017

**Department Head:** Kay Macuil, City Attorney, Attorney's Office

**Submitted By:** Kay Macuil, City Attorney, Attorney's Office

**Action Requested:** Motion

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#### ITEM:

##### EXECUTIVE SESSION

Vote to hold an Executive Session pursuant to A.R.S. §38-431.03(A)(3), (4) and (7)

Discussion and possible action to hold an Executive Session pursuant to A.R.S. §38-431.03(A)(3), (4) and (7) for discussion or consultation, for legal advice with the City Attorney or City Attorneys, and/or with the City Attorney of City's attorneys in order to consider its position and instruct its attorneys regarding City Council's position regarding contracts that are the subject of negotiations, and/or with designated representatives of City Council in order to consider its position and instruct its representatives regarding negotiations for the purchase, sale or lease of real property in relation to a Development Agreement with San Luis Commercial Holdings, L.L.C. **(Kay Marion Macuil, City Attorney; Bill Sims, Outside Counsel, Jenny Torres, Community Development Director; Ralph Velez, City Consultant)**

#### SUMMARY:

City Council can be properly advised by holding an executive session for the purposes described in the agenda item.

Jenny Torres, Ralph Velez and Bill Sims have been most involved in the negotiations.

#### RECOMMENDATION / SUGGESTED MOTION:

**I MOVE TO HOLD AN EXECUTIVE SESSION PURSUANT TO A.R.S. §38-431.03(A)(3), (4) AND (7).**

**Supporting information not attached to the Agenda Item Review Form:**

N/A

**Document to be Recorded?:** No

N/A

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#### Fiscal Impact

<b>IS THERE FISCAL IMPACT ASSOCIATED WITH THIS ITEM:</b>	N/A
<b>CITY/STATE/FEDERAL FUNDS:</b>	N/A
<b>TOTAL:</b>	N/A
<b>BUDGETED AMOUNT:</b>	N/A
<b>AVAILABLE AMOUNT TO TRANSFER:</b>	N/A

**ACCT NAME & GL#/REMAINING BALANCE BEFORE PURCHASE: N/A**

**FISCAL IMPACT STATEMENT (IF THIS IS A BUDGET TRANSFER, YOU MUST ATTACH THE BUDGET ADJUSTMENT FORM):**

Fiscal impact is not applicable to this agenda item under A.R.S. §38-431.03(D), legal action involving a final vote or decision is not permitted to be taken at an executive session.

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## AGENDA ITEM REVIEW FORM

### Special City Council Meeting

6.A.

**Meeting Date:** 06/07/2017

**Department Head:** Kay Macuil, City Attorney, Attorney's Office

**Submitted By:** Kay Macuil, City Attorney, Attorney's Office

**Action Requested:** Motion  
Resolution

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### ITEM:

Discussion and possible action on any and all matters regarding Resolution No. 1193. A resolution of the Mayor and City Council of the City of San Luis, Arizona approving a Development Agreement with San Luis Commercial Holdings, L.L.C., an Arizona limited liability company. **(Jenny Torres, Community Development Director)**

### SUMMARY:

The City of San Luis staff negotiated a development agreement with San Luis Commercial Holdings, L.L.C to develop a brand hotel and restaurant, a franchise convenient store and gas station, and other transaction privilege tax generating businesses on the project site to be located at the northwest corner of the intersection of Highway 95 and County 22nd Street within the San Luis city limits.

The development agreement complies with A.R.S §95-500.11 where actions taken by the city pursuant to this agreement are for economic development purposes and will assist in the creation and retention of jobs. The economic impact analysis findings demonstrate that the total projected revenues exceed the anticipated tax credit by over 196%. The breakdown of the city benefits include \$2,170,900.00 of transaction privilege taxes, \$730,000.00 in utility system revenue and \$676,900.00 in payroll revenue, for total revenue of \$3,578,700.00.

The City will participate by purchasing two acres for a retention basin at the fair market value and reimburse the developer for the cost of public infrastructure at a combined cost with the retention basin not to exceed \$500,000.00 to the City. The development agreement includes a sales tax rebate. The developer will receive 50% of the City's 4% transaction privilege taxes as generated from businesses established on the project site. The amount of the rebate is capped at a maximum of \$1,822,680.00 over a period of 15 years.

The conditions to receive the transaction privilege taxes include complete construction improvements within 18 months from the commencement of the hotel project, operation and lease of proposed projects (hotel, restaurant, convenience store, gas station, and other commercial enterprises) and disclosing of employment figures to the city to be sure the projects are hitting the employment marks in the agreement.

The proposed project consists of a \$15 million investment that will enhance the economic welfare of the residents, increase the tax revenues to the city, provide job opportunities for San Luis residents and will trigger other development in the area. The city has taken the necessary steps to comply with Arizona law with regard to the power granted by A.R.S. §95-500.11 and the limitations imposed by Article 9, Section 5 of the Arizona Constitution, known as the anti-gift clause.

The final development agreement is in the final negotiation stage and so at time of posting this agenda

item, the draft rather than the final version is attached. The final agreement will be provided by the time of the Agenda Item or before.

Staff recommends the approval of the proposed resolution which include adoption and its attached and incorporated development agreement.

**RECOMMENDATION / SUGGESTED MOTION:**

**I MOVE TO APPROVE AND ADOPT RESOLUTION NO. 1193.**

**Supporting information not attached to the Agenda Item Review Form:**

The final version of the development agreement will be provided later.

**Document to be Recorded?:** Yes

**City Clerk's Office**

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**Fiscal Impact**

<b>IS THERE FISCAL IMPACT ASSOCIATED WITH THIS ITEM:</b>	Yes
<b>CITY/STATE/FEDERAL FUNDS:</b>	City
<b>TOTAL:</b>	\$500,000.00
<b>BUDGETED AMOUNT:</b>	FY 2017-2018
<b>AVAILABLE AMOUNT TO TRANSFER:</b>	N/A
<b>ACCT NAME &amp; GL#/REMAINING BALANCE BEFORE PURCHASE:</b>	To be determined
<b>FISCAL IMPACT STATEMENT (IF THIS IS A BUDGET TRANSFER, YOU MUST ATTACH THE BUDGET ADJUSTMENT FORM):</b>	
Fiscal impact is budgeted for Fiscal Year 2017-2018.	

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**Attachments**

Resolution No. 1193  
DRAFT Development Agreement  
Exhibit 2 - Economic Impact Analysis  
Az Const Anti Gift Clause  
ARS 9-500-05 Dev Agreements  
ARS 9-500-11 Tax Incentive Requirements

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# *Resolution*

OFFICE OF THE  
MAYOR  
CITY OF SAN LUIS

**No. 1193**

**A RESOLUTION OF THE MAYOR AND CITY COUNCIL OF THE CITY OF SAN LUIS, ARIZONA APPROVING A DEVELOPMENT AGREEMENT WITH SAN LUIS COMMERCIAL HOLDINGS, L.L.C., AN ARIZONA LIMITED LIABILITY COMPANY.**

**BE IT RESOLVED** by the Mayor and City Council of the City of San Luis, Arizona, as follows:

**Section 1.** That it is deemed in the best interest of City of San Luis and its residents to enter into the attached Development Agreement (Exhibit 1) because the project will improve and enhance the economic welfare of the residents of the City of San Luis and increase tax revenues to the City.

**Section 2.** That the Mayor and City Council find pursuant to A.R.S. §9-500.11:

1. that the tax incentive in the attached Development Agreement (Exhibit 1) is anticipated to raise more revenue than the amount of the incentive within the duration of the agreement as supported by the independent, third party Economic Impact Analysis prepared by Dan V. Jackson dated May 12, 2017 (Exhibit 2); and
2. that in the absence of the tax incentive authorized pursuant to the Development Agreement, the retail businesses facilities would not locate in the City of San Luis at this time, place or manner.

**Section 3.** That the Mayor or City Manager and/or his designee are hereby authorized and directed to execute said Development Agreement on behalf of the City of San Luis and to take any and all actions as may be necessary to put the agreement into effect.

**Section 4.** That the San Luis City Clerk and/or her designee is authorized and directed to file this Development Agreement in the official files of the City Clerk and to deliver it to San Luis Commercial Holdings, L.L.C.

**PASSED, ADOPTED and APPROVED** by the Mayor and City Council of the City of San Luis, Yuma County, Arizona, this \_\_\_\_ day of June, 2017.

\_\_\_\_\_  
Gerardo Sanchez, Mayor

**ATTEST:**

**APPROVED AS TO FORM:**

\_\_\_\_\_  
Sonia Cornelio, City Clerk

\_\_\_\_\_  
Kay Marion Macuil, City Attorney

When recorded, return to:  
Sonia Cornelio, City Clerk  
The City of San Luis  
P.O. Box 1170  
San Luis, AZ

## DEVELOPMENT AGREEMENT

**THIS DEVELOPMENT AGREEMENT (“Agreement”)** is entered into this \_\_\_\_ day of \_\_\_\_\_, 2017 by and between the City of San Luis, an Arizona municipal corporation (the “City”), and San Luis Commercial Holdings, LLC, an Arizona limited liability company (“Developer”). The City and the Developer may be referred to herein as either a “Party” or collectively, the “Parties.”

### RECITALS

**A. WHEREAS**, the Developer desires to develop a mixed use commercial project located at the northwest corner of the intersection of Highway 95 and 22<sup>nd</sup> Street within the City’s limits (the “Project Site”) as described on Exhibit A

**B. WHEREAS**, the Parties agree that the current and future development of the Project Site will improve and enhance the economic welfare of the residents of the City, as well as increase the tax revenues to the City, which revenues would not be generated without such development; and

**C. WHEREAS**, the Parties understand and acknowledge that this Agreement is a “Development Agreement” within the meaning of and entered into pursuant to the terms of A.R.S. § 9-500.05, in order to facilitate the development of the Project Site; and the terms of this Agreement shall constitute covenants running with the Project Site as more fully described in this Agreement; and

**D. WHEREAS**, the Developer intends to develop the Project Site to include a hotel, a convenience store/gas station, restaurant and possibly other retail or professional/medical space as depicted on the Concept Plan attached as Exhibit B (the “Project”). The project consists of approximately 49,000 square feet of commercial space.

**E. WHEREAS**, the Parties also understand and acknowledge that this Agreement is authorized by and entered into in accordance with the terms of A.R.S § 9-500.11. The actions taken by the City pursuant to this Agreement are for economic development purposes, as that term is used in A.R.S. §9-500.11, will assist in the creation and retention of jobs, and will otherwise improve or enhance the economic welfare of the residents of the City.

**NOW THEREFORE**, in consideration of the above premises, the promises contained in this Agreement and for good and valuable consideration, the receipt and sufficiency of which the Parties acknowledge, the Parties hereto agree as follows:

**ARTICLE I**  
**PURPOSE AND SCOPE OF AGREEMENT**

**1.1 Recitals.** The parties represent to one another that the recitals set forth above, which are incorporated herein by reference, are true and correct, and acknowledge that the parties may rely thereon.

**1.2 Purpose.** This Agreement is intended to encourage the development of the Project in the form of retail tax incentives pursuant to Article IV and in the form of public infrastructure assistance pursuant to Article V (collectively, the “**Development Incentives**”). The Parties realize that without the benefits offered to the Developer through this Agreement that the Project would not locate in the City in the same time, place or manner.

**1.3 Term.** The term of this Agreement shall commence on the Effective Date and terminate fifteen (15) years thereafter unless terminated earlier as permitted by this Agreement.

**ARTICLE II**  
**DEFINITIONS**

The following terms shall have the meanings set forth below whenever used in this Agreement, except where the context clearly indicates otherwise.

**2.1 “Agreement”** means this Development Agreement, as amended and restated or supplemented in writing from time to time, and includes all exhibits and schedules hereto. References to Articles, Sections or Exhibits are to this Agreement unless otherwise qualified.

**2.2 “City”** means the City of San Luis, a municipal corporation.

**2.3 “Commencement of Construction” or “Commence Construction”** means the obtaining of a building, excavation, grading or similar permit by Developer for the construction of the subject Improvement.

**2.4 “Completion of Construction”** means the date on which final certificates of occupancy have been issued by the City for any Improvement and the date that the City issues a notice of acceptance upon the completion of Site Infrastructure.

**2.5 “Concept Plan”** is defined in Recital D.

**2.6 “Construction Benchmark”** is defined in Section 3.2.1.

- 2.7 **“Convenience Store/Gas Station”** means a small retail business that stocks a range of groceries, snack foods, soft drinks, alcohol, tobacco products, over the counter medications, toiletries, newspapers, magazines and sells gas and related products.
- 2.8 **“Default”** is defined in Section 7.1.
- 2.9 **“Developer”** means San Luis Commercial Holdings, LLC, an Arizona limited liability company.
- 2.10 **“Development Incentives”** is defined in Section 1.2.
- 2.11 **“Economic Incentive Criteria”** is defined in Section 3.2.
- 2.12 **“Effective Date”** means the date on which the last party executes this Agreement, as set forth above, and which shall be no less than thirty (30) days from the date upon which this Agreement has been adopted and approved by ordinance by the City Council.
- 2.12 **“Employee Benchmark”** is defined in Section 3.2.3.
- 2.13 **“Force Majeure Event”** means any event which prohibits or materially interferes with, delays or alters the performance of any act under this Agreement, including, but not limited to the following: delays in any utility providing utilities to the Site; acts by third-parties; strikes or lockouts; shortages of material or labor (excluding those caused by lack of funds); acts of the public enemy; confiscation or seizure by any government or public authority; injunction, restraining order or other court order or decree, initiative or referendum action; wars or war-like action (whether actual and pending or expected, and whether de jure or de facto); blockades; insurrections; riots; civil disturbances; and acts of God; but excluding delays caused by lack of funds.
- 2.14 **“Full Time Employee”** means an employee employed by a tenant of Developer that is operating one of the Improvements that works at least 1,560 hours per year.
- 2.15 **“Hotel”** means a operator of short-term lodging with approximately 75 rooms.
- 2.16 **“Improvement”** means the Site Infrastructure, Hotel, Restaurant, Retail/Medical/Professional Building, and Convenience Store/ Gas Station.
- 2.17 **“Retail/Medical/Professional Building”** means a retail/medical/professional building of approximately 5,000 square feet or more.
- 2.18 **“Project”** is defined in Recital D.

- 2.19 “**Project Site**” is defined in Recital A.
- 2.20 “**Project Site Acquisition Date**” means the date that the Developer acquires the Project Site
- 2.21 “**Project Tenants**” is defined in Section 3.2.4.
- 2.22 “**Quarter**” means the periods from January 1 to March 31 (“Quarter 1”), April 1 to June 30 (“Quarter 2”), July 1 to September 30 (“Quarter 3”), and October 1 to December 31 (“Quarter 4”).
- 2.23 “**Restaurant**” means a “sit down” food establishment of no less than 2,500 square feet.
- 2.22 “**Retention Basin**” means the approximately 1.922 acre parcel depicted on the Concept Plan to be used for storm water retention and for public park purposes.
- 2.23 “**Sales Taxes**” means the unrestricted portion of the four percent (4.0%) general transaction privilege tax imposed under the Tax Code of the City of San Luis.
- 2.24 “**Sales Tax Rebate**” is defined in Section 4.1.
- 2.25 “**Schedule of Performance**” means and refers to that schedule of performance agreed to by the Parties as set forth in Exhibit C attached hereto and incorporated herein by reference.
- 2.26 “**Site Infrastructure**” means the construction and the Developer’s acceptance of the necessary off-site and on-site improvements, pad development and utility “stub-outs” necessary to commence vertical construction or to obtain a building permit for vertical construction.
- 2.27 “**Site Infrastructure Date**” means the date of Developer’s acceptance of the construction of the necessary off-site and on-site improvements, pad development and utility “stub-outs” necessary to commence vertical construction or to obtain a building permit for vertical construction.
- 2.28 “**Term**” is defined in Section 1.3.

**ARTICLE III**  
**PROJECT DEVELOPMENT; ZONING AND SUBDIVISION APPROVAL**

**3.1 Schedule of Performance.** The Developer shall develop the Project in accordance with the “**Schedule of Performance**” attached as Exhibit C. The Project is depicted on the “**Concept Plan**” attached as Exhibit B. The failure to Complete Construction of the Hotel on or

before January 1, 2020, as set forth in § 3.2.2 below, shall also constitute a default under this Agreement.

**3.2 Economic Incentive Criteria.** Developer hereby acknowledges and agrees that in order to be eligible for the Development Incentives, it must meet the following criteria (collectively, the “**Economic Incentive Criteria**”):

**3.2.1 Commencement of Construction.** The Developer must Commence Construction of the following Improvements on or before the respective dates set forth below; each such date shall be referred to herein as a “**Construction Benchmark**.”

- |                                  |  |
|----------------------------------|--|
| a. Site Infrastructure           | 180 days from Project Site Acquisition Date. |
| b. Hotel                         | 180 days from Site Infrastructure Date.      |
| c. Restaurant                    | 180 days from Site Infrastructure Date.      |
| d. Convenience Store/Gas Station | 360 days from Site Infrastructure Date.      |

Developer in its discretion may elect to swap the start dates for the above listed Improvements, but in no event shall the Site Infrastructure Date be later than 180sixty (60) days after the Project Site Acquisition Date and the Commencement of Construction for all of the Improvements be later than 360 days after the Site Infrastructure Date .

**3.2.2 Completion of Construction.** The Developer must Complete Construction of the Hotel on or before January 1, 2020.

**3.2.3 Employee Benchmark.** The parties have relied on the “*Proposed Retail Tax Incentive Agreement with San Luis Commercial Holdings, L.L.C. for Multi-Use Site*,” report dated May 12, 2017 and prepared by Willdan/Economists.com to identify the “**Employee Benchmarks**” as representing the number of employees necessary to operate the respective Improvement when fully operational. The Parties have agreed that the Developer has met the Employee Benchmark when the following are met:

- (1) 34,000 square feet of the Project is operational and actually leased by a tenant; and
- (2) Developer shall require all tenants for the Improvements to disclose the initial employment figures to the Developer upon the tenant’s signing a lease agreement. The Developer shall report the tenants employment disclosures to the City within thirty (30) days of Developer’s receipt of the disclosures; and

**3.3 Zoning, Subdivision and Permit Review and Approvals.** The City agrees to review and act on any zoning, land division/subdivision and/or permit applications in a timely manner so as not to delay or impair Developer’s development of the Project Site in accordance with the terms and conditions of this Agreement. The City agrees upon the Developer’s request, and to the extent permissible under Arizona law, to expedite the review and approval of any zoning, land division/subdivision and/or permit applications or submissions the Develop submits to the City for review and approval.

**ARTICLE IV**  
**ECONOMIC INCENTIVES**

**4.1 Sales Tax Rebate.** The City agrees that it shall rebate and pay to Developer Sales Taxes (the “**Sales Tax Rebates**”) equal to (50%) of the Sales Taxes imposed and actually received by the City for construction and related contracting activities by Developer and Developer’s contractors and subcontractors in constructing the Improvements of the Project; (ii) and fifty percent (50%) of all unrestricted Sales Taxes imposed and actually received by the City for retail sales, admissions, exhibitions, amusements, restaurant, bar, hotel and transient occupancy occurring within the Project until the first to occur of the following dates or events:

- a. Developer has received \$1,822,680.00 in aggregate Sales Tax Rebates; or
- b. The fifteenth (15<sup>th</sup>) anniversary from the date upon which this Agreement has been adopted and approved by ordinance by the City Council.

The City’s obligation to pay Developer the Sales Tax Rebates from Sales Taxes arising out of the construction and related contracting activities by Developer and Developer’s contractors and subcontractors in constructing the Improvements of the Project is contingent upon Developer’s Commencement of Construction set forth in Section 3.2.1 above. Developer’s failure to meet the Commencement of Construction Benchmarks set forth in 3.2.1 only effects its right to receive the Sales Tax Rebates from Sales Taxes arising out of construction activities. It does not effect its right to receive the Sales Tax Rebates from Sales Taxes received from the sales, admissions, exhibitions, amusements, restaurant, bar, hotel and transient occupancy occurring within the Project.

The City’s obligation to pay Developer the Sales Tax Rebates from Sales Taxes imposed and actually received by the City for retail sales, admissions, exhibitions, amusements, restaurant, bar, hotel and transient occupancy occurring within the Project is contingent upon Developer’s Completion of Construction set forth in Section 3.2.2 and Developer meeting the Employee Benchmarks set forth in Section 3.2.3 above.

**ARTICLE V**  
**CITY PUBLIC IMPROVEMENTS, INFRASTRUCTURE AND MARKETING**

**5.1 Retention Basin.** Simultaneous with the Project Site Acquisition Date, the City shall purchase from Developer (or from the ownerowner of the Project Site if the Retention Basin property is not yet owned by the Developer) the Retention Basin at a cost no more than fair market value plus 10%; provided that the thethe entity selling such property has submitted to the City copies of all due diligence materials and title reports concerning the Project Site. The City shall be provided with, at no cost to the City, a standard title insurance policy for the Retention Basin property and the City shall pay for extended owner’s policy if the City so elects.

## **5.2 Public Infrastructure.**

**5.2.1 Mandatory.** The City must reimburse the Developer for the cost of public Infrastructure described in the Concept Plan in amount not to exceed the difference between FIVE HUNDRED THOUSAND DOLLARS (\$500,000) and the cost of the Retention Basin. The City shall make such payments to Developer within ten (10) days following receipt of an invoice therefore and a description of the procurement process undertaken to procure the invoiced Public Infrastructure. Such payment is conditioned on the Developer's procurement process complying with Title 34 of the Arizona Revised Statutes.

**5.2.2 Permissive.** At the request of the City, the Developer may undertake offsite public infrastructure in conjunction with the Developer's Public Infrastructure on the Project Site. In such case, the City shall reimburse the Developer by making payments to the Developer within ten (10) days following receipt of an invoice for such offsite public infrastructure and a description of the procurement process undertaken to procure the invoiced Public Infrastructure. Such payment is conditioned on the Developer's procurement process complying with Title 34 of the Arizona Revised Statutes and the City's approval of such offsite public infrastructure.

**5.3 Marketing.** The City must work with the Developer in the marketing of the Hotel and Restaurant, and other businesses located on the Project Site, including the promotion of the Hotel to governmental agencies and other businesses doing business in City.

## **ARTICLE VI** **INDEMNITY AND REPRESENTATIONS**

**6.1 Indemnity by the Developer.** ToTo the extent permitted by law, the Developer shall pay, defend, indemnify and hold harmless the City and its City Council members, officers, employees, agents and representatives from and against all claims, demands, fines, penalties, costs, expenses, damages, losses, obligations, judgments, liabilities, and suits (including reasonable attorney's fees, experts' fees and court costs associated) which arise from or relate in any way to any negligent or willful acts or omissions by the Developer, or its employees, contractors, subcontractors, agents or representatives, undertaken pursuant to this Agreement; provided however, that the provisions of this Section 6.1 shall not apply to the extent that any loss or claim is caused by the negligence of intentional misconduct of the City, the City Council members, officers, employees, contractors, subcontractors, agents or representatives. The foregoing indemnity obligations of the Developer shall survive the expiration or termination of this Agreement for a period equal to the applicable statute of limitations period.

**6.2 Indemnity by the City.** ToTo the extent permitted by law, the City shall pay, defend, indemnify and hold harmless the Developer and its managers, members, agents and representatives from and against all claims, demands, fines, penalties, costs, expenses, damages, losses, obligations, judgments, liabilities and suits (including reasonable attorney's and experts' fees and court costs associated) which arise from or which relate in any way to (1) this Agreement,

including any suit challenging its validity or the validity of any of its provisions; and (2) any negligent or willful act or omission by the City and its City Council members, employees, contractors, subcontractors, agents or representatives, undertaken pursuant to this Agreement; provided however, that the provisions of this Section 6.2 shall not apply to the extent that any loss or claim is caused by the negligence or intentional misconduct of the Developer or its partners, shareholders, officers, managers, members, agents, employees, contractors, subcontractors or representatives. The foregoing indemnity obligations of the City shall survive the expiration or termination of this agreement for a period equal to the applicable statute of limitations period.

**6.3 City Representations.** The City represents and warrants to the Developer that:

**6.3.1** The City has the full right, power and authorization to enter into and perform this Agreement and each of City's obligations and undertakings under this Agreement, and the City's execution, delivery and performance of this Agreement have been duly authorized.

**6.3.2** The City will execute and acknowledge when appropriate all documents and instruments and take all actions necessary to implement, evidence and enforce this Agreement.

**6.4 Developer Representations.** The Developer represents and warrants to the City that:

**6.4.1** The Developer has the full right, power and authorization to enter into and perform this Agreement and of the obligations and undertakings of the Developer this Agreement, and the execution, delivery and performance of this Agreement by the Developer has been duly authorized.

**6.4.2** The Developer will execute and acknowledge when appropriate all documents and instruments and take all actions necessary to implement, evidence and enforce this Agreement.

**ARTICLE VII**

**DEFAULT; REMEDIES; TERMINATION AND ASSIGNMENT**

**7.1 Default.** A Party hereunder shall be deemed to be in default under this Agreement if such Party breaches any obligation required to be performed by the respective Party hereunder within any time period required for such performance, and such breach or default continues for a period of ninety (90) days after written notice thereof from the non-defaulting Party; provided, however, if the breach or default cannot reasonably be cured within such ninety (90) day period, then the Party shall be in default if it fails to commence the cure of such breach within the ninety (90) day period and diligently pursue the same to completion. Absent written agreement to the contrary, if such default is not cured within the additional ninety (90) day period, this Agreement may be terminated, at the sole and absolute discretion of the non-breaching Party.

**7.2 Dispute Resolution.** In the event that there is a dispute hereunder which the Parties cannot resolve between themselves, the Parties agree that there shall be a sixty (60) day moratorium on litigation during which time the Parties agree to attempt to settle the dispute by nonbinding mediation before commencement of litigation. The mediation shall be held under the commercial mediation rules of the American Arbitration Association. The mediator selected shall have at least five (5) years' experience in mediating or arbitrating disputes relating to commercial property development. The cost of any such mediation shall be divided equally between the City and the Developer, or in such other fashion as the mediator may order. The results of the mediation shall be nonbinding on the Parties, and any Party shall be free to initiate litigation upon the conclusion of mediation.

**7.3 No Personal Liability.** No manager, member, official, employee, agent or representative of the City or Developer shall be personally liable to the other (a) in the event of any default or breach by the City or Developer, (b) for any amount which may become due to the City or Developer or (c) pursuant to any obligation of the City or Developer under the terms of this Agreement.

**7.4 Developer's Remedies.** In the event the City is in default under this Agreement and fails to cure any such default within the time period required as set forth in Section 7.1 above, then, in that event, in addition to pursuing any and all other legal and equitable remedies which the Developer may have against the City, the Developer may also elect to terminate this Agreement by written notice delivered to the City.

**7.5 City's Remedies.** In the event that the Developer is in breach under this Agreement and the Developer thereafter fails to cure any such breach within the time period described in Section 7.1 above, then the City shall have the right to automatically terminate this Agreement immediately upon written notice to the Developer.

**7.6 Extension of Time.** The Developer's obligations under Section 3.1 shall be extended for each and every Force Majeure Event. Developer shall notify the City of the occurrence of a Force Majeure Event affecting the obligations of the Developer under Section 3, and the time for commencement of the obligations under Section 3.1 shall be extended day for day during the continuance of any Force Majeure Event. Furthermore, other than a Force Majeure Event, if the City's failure to timely approve requests under this Development Agreement is delayed by an amount of time, then the deadlines for the Developer to perform its obligations or other actions under this Development will be extended by that amount of time.

**7.7 Assignment.** Neither Party may assign its rights of obligations under this Agreement without the prior written consent of the other Party.

## **ARTICLE VIII** **GENERAL PROVISIONS**

**8.1 Time of Essence.** Time is of the essence of each and every provision of this Agreement.

**8.2 Conflict of Interest.** Pursuant to Arizona law, rules and regulations, no member, official or employee of the City shall have any personal interest, direct or indirect, in this Agreement, nor shall any such member, official or employee participate in any decision relating to this Agreement which affects his or her personal interest or the interest of any corporation, partnership or association in which he or she is, directly or indirectly, interested. This Agreement is subject to cancellation pursuant to A.R.S. § 38-511.

**8.3 Notices.** All notices, approvals, and other communications provided for herein or given in connection herewith shall be validly given, made, delivered or served, and delivered personally or sent by nationally recognized courier (e.g., Federal Express, Airborne, UPS), or by United States mail, certified with return receipt requested, to::

If to the City : Mr. Tadeo A. De La Hoya, City Manager  
The City of San Luis  
P.O. Box 1170  
San Luis, AZ 85349

With a copy to: San Luis City Attorney  
The City of San Luis  
P.O. Box 1170  
San Luis, AZ

If to Developer: San Luis Commercial Holdings, LLC  
c/o Ross Wait  
4774 East 30th Place, Suite A  
Yuma, AZ 85365

With copies to: Barry Olsen, Esq.  
Law Offices of Larry W. Suci, PLC  
101 East Second Street  
Yuma, AZ 85364

Or to such other addresses as any Party hereto may from time to time designate in writing and deliver in a like manner. Notices, approvals and other communications provided for herein shall be deemed delivered upon personal delivery, within twenty-four (24) hours following deposit with a nationally recognized overnight courier, or within forty-eight (48) hours following deposit with the United States mail, certified with return receipt requested, as hereinabove provided, prepaid and addressed as set forth above.

**8.4 Governing Laws.** This Agreement shall be governed by and construed in accordance with the laws of the State of Arizona. This Agreement has been made and entered into

in Yuma County, Arizona. Pursuant to the provisions of A.R.S. §41-4401, Developer further agrees to warrant that it and any of its contractors or subcontractors will comply with all federal immigration laws and regulations that relate to their employees and their compliance with A.R.S. §23-214, subsection A. A breach of this warranty shall be deemed a material breach of this Agreement with City and will be subject to the penalties of A.R.S. §41-4401.A.2. The City shall have the right to random verification of employment records of Developer, its contractors, or subcontractors to ensure compliance with this warranty. The Parties agree that they are not currently engaged in, and agree that for the duration of the Agreement they will not engage in, a boycott of Israel, as that term is defined in A.R.S. §35- 393.

**8.5 Successors and Assigns.** This Agreement shall run with the land and all of the covenants and conditions set forth herein shall inure to the benefit of and be binding upon the permitted successors and assigns of the Parties hereto.

**8.6 Waiver.** No waiver by either Party of any breach of any of the terms, covenants or conditions of this Agreement shall be construed or held to be a waiver of any succeeding or preceding breach of the same for any other term, covenant or condition herein contained.

**8.7 Attorneys' Fees.** In the event of any actual litigation between the parties in connection with this Agreement, the Party prevailing in such action shall be entitled to recover from the other Party all of its costs and fees, including reasonable attorneys' fees, which shall be determined by the court and not by the jury.

**8.8 Counterparts.** This Agreement may be executed in one or more counterparts and by facsimile or other means of electronic signature, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument. The signature pages from one or more counterparts may be removed from such counterparts and such signature pages all attached to a single instrument so that the signature of all parties may be physically attached to a single document.

**8.9 Limited Severability.** The City and the Developer each believes that the execution, delivery and performance of this Agreement is in compliance with all applicable statutes, regulations, ordinances and other laws ("**Applicable Laws**"). However, in the unlikely event that any phrase, clause, sentence, paragraph, section, article or other portion of this Agreement is declared void or unenforceable, or is construed as requiring the City to do any act in violation of any Applicable Laws, such provision shall be deemed severed from this Agreement and this Agreement shall otherwise remain in full force and effect.

However, if:

- (1) the City's obligations related to payments of any kind owed to the Developer, or reimbursements owed to the Developer, the Developer's right to Sales Tax Rebates are deemed illegal, in violation of any Applicable Laws, void, voidable, or unenforceable; then

- (2) the Developer will be released from the obligations under this Agreement related to those payments, reimbursements, or Sales Tax Rebates.

But if:

- (1) the Developer has performed the obligations under this Agreement entitling it to payments, reimbursements, or Sales Tax Rebates, and
- (2) the City's obligations to make payments to Developer, reimburse the Developer, or the Developer's right to Sales Tax Rebates are deemed in violation of any Applicable Laws, void, voidable, or unenforceable, then
- (3) the City will explore and negotiate with Developer in good faith other legal options so that Developer may recoup the costs that the parties originally intended under this Agreement.

**8.10 Schedules and Exhibits.** All schedules and exhibits attached hereto are incorporated herein by this reference as though fully set forth herein.

**8.11 Entire Agreement and Amendment.** This Agreement constitutes the entire agreement between the parties hereto pertaining to the subject matter hereof and all prior and contemporaneous agreements, representations, negotiations and understandings of the parties hereto, oral or written, are hereby superseded. This Agreement may not be amended except by a written amendment executed by the Parties.

**8.12 Recordation of Agreement.** This Agreement shall be recorded in the Official Records of Yuma County, Arizona, within ten (10) days after its approval and execution by the City. However, the Agreement shall not become effective until thirty (30) days from the date after approval by City Council.

**8.14 No Third Party Beneficiaries.** There are no third party beneficiaries to the Agreement, and no person or entity not a Party will have any right or cause of action.

**8.15 No Agency Created.** Nothing contained in the Agreement will create any partnership, joint venture, or agency relationship between the Parties.

**8.16 Headings.** The descriptive headings of the paragraphs of this Agreement are inserted for convenience only and shall not control or affect the meaning or construction of any of the provisions hereof.

**8.17 Venue.** Any legal action relating to this Agreement or the agreements contemplated herein shall be brought in either the Yuma County Superior Court at the election of the plaintiff in such legal action, provided, however, that nothing in this paragraph will be deemed to have authorized the bringing of any legal action in a court which does not otherwise have jurisdiction to adjudicate the legal action.

**8.18 Estoppel Certificate.** Any party may request of the other party, and the requested party shall, within fifteen (15) business days, respond and certify by written instrument to the requesting party that (a) this Agreement is unmodified and in full force and effect, (b) the existence of any default under this Agreement and the scope and nature of the default, if applicable, (c) the existence of any counterclaims which the requested party has against the other party, and (d) any other matters that may reasonably be requested in connection with this Agreement and the approval of the Project. In the event a party has not received an estoppel certificate within fifteen (15) business days from the date of the request, then in such event, said party shall be entitled to prepare an estoppel certificate and deliver the certificate to the City and such estoppel certificate shall be binding upon the City.

**IN WITNESS WHEREOF**, the parties have executed this Agreement as of the date first set forth above.

**DEVELOPER**

**THE CITY**

**CITY OF SAN LUIS**, an Arizona  
municipal corporation

By: \_\_\_\_\_  
Mayor

**ATTEST:**

By: \_\_\_\_\_  
City Clerk

**APPROVED AS TO FORM:**

By: \_\_\_\_\_  
City Attorney

STATE OF ARIZONA        )  
  ) ss.  
County of Yuma            )

The foregoing instrument was acknowledged before me this \_\_\_\_ day of \_\_\_\_\_, 2017, by \_\_\_\_\_, Mayor of the City of San Luis, who acknowledged that he/she signed the foregoing instrument on behalf of the City.

\_\_\_\_\_  
Notary Public

My commission expires:

\_\_\_\_\_

STATE OF ARIZONA     )  
                                  ) ss.  
County of Yuma         )

The foregoing instrument was acknowledged before me this \_\_\_\_ day of \_\_\_\_\_, 2017 by \_\_\_\_\_.

\_\_\_\_\_  
Notary Public

My commission expires:

\_\_\_\_\_

# City of San Luis, Arizona Economic Impact Analysis

## Proposed Retail Tax Incentive Agreement with San Luis Commercial Holdings, L.L.C. for Multi-Use Site

Prepared by:



5500 Democracy Drive, Suite 130 | Plano, Texas 75024

Tel: (972) 378-6588 | Cell: (972) 998-0417 | Fax: (972) 378-6988

Contact Person:

Dan V. Jackson, Vice President | Email: [djackson@willdan.com](mailto:djackson@willdan.com)

May 12, 2017

May 12, 2017

Ms. Jenny Torres  
Community Development Director  
City of San Luis  
1090 East Union St.  
San Luis, AZ 85349

**Re: Economic Impact Analysis – San Luis Commercial Holdings, L.L.C. Multi-Use Project Site**

Dear Ms. Torres:

Pursuant to our agreement with the City of San Luis (the City), **Willdan/Economists.com** is pleased to present herein the results of the Economic Impact Analysis of the San Luis Commercial Holdings, L.L.C. Multi-Use Site. This Letter Report summarizes our findings.

The Report is based on estimates, assumptions and other information related to the above. Such estimates, assumptions or other information were developed from prior research, knowledge of the industry and discussions with you and other involved parties, during which we were provided certain information. The sources of information and bases of estimates and assumptions are stated in the Report. Our documentation is based on estimates and assumptions which are inherently subject to uncertainty and variation depending upon evolving events.

Any conclusions and/or any prospective financial information that is included in our documentation were based on estimates and assumptions from previous studies, information developed from supplemental research, knowledge of the industry and other sources, including certain information that the City and/or developer provided. These sources of information and bases of significant estimates and assumptions are stated in our documentation. Some assumptions inevitably will not materialize and unanticipated events and circumstances may occur. Therefore, actual results achieved will vary from any estimates, and the variations may be material.

We extend our thanks and appreciation for the opportunity to be of service in this matter, and for the City's and its staff's valuable cooperation and assistance. If you have any questions, please do not hesitate to contact me at 972.378.6588 or [djackson@willdan.com](mailto:djackson@willdan.com).

Respectfully submitted,

**WILLDAN FINANCIAL SERVICES**



**Dan V. Jackson**  
**Vice President**

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## Introduction

**Willdan/Economists.com** was retained by the City of San Luis, Arizona (the “City”) to evaluate the fiscal and economic benefits associated with the development of a multi-use site by San Luis Commercial Holdings, L.L.C. (the “Developer”). The Developer is proposing to develop and maintain a multi-use hotel, restaurant, and convenience store/gas station on the site.

The proposed Project location will be a 5 to 8-acre site at the northwest corner of the intersection of Highway 95 and 22<sup>nd</sup> Street within the City’s limits (the “Project Site”). As identified in the Memorandum of Understanding (the “MOU”) between the City and the Developer, the Project Site is owned by MJS Properties, L.P. an Arizona limited partnership, and the acquisition of the Project Site by the Developer has yet to occur as of the date of this Report.

This Report identifies the estimated economic and fiscal impacts of the multi-use project at the Project Site. An Economic Impact Analysis examines the effect of a particular project on the economy in a specified area, ranging from a single neighborhood to the entire globe. It usually measures changes in business revenue, business profits, personal wages, and/or jobs.

A Fiscal Impact Analysis addresses the net impact on government of a particular project. This is done by estimating the increase in revenues to a municipality. For this Project, the estimated revenues that will be increased include a variety of taxes including, but not limited to, state income taxes, sales tax/transaction privilege tax, and utility fee revenues. **Schedules 4 and 5** of this Report present the different categories and estimated annual revenues for each.

## Background

As described in the MOU, the Developer intends to develop a “brand” hotel, a “brand” restaurant, a franchise convenience store and gas station, and other transaction privilege tax generating businesses on the Project Site. In addition to generating transaction privilege taxes directly to the City, these businesses will indirectly benefit the City by providing employment in a City with a historically high unemployment rate, enhance property values of nearby properties, and generate other economic development in the City limits. The Developer, to maximize its leverage and maximize use of its development funding for actual development of the site, as opposed to using those resources for land acquisition, desires to receive credit for the transaction privilege tax revenue being generated to the City from the developed Project Site for the cost to acquire the Project Site. Having an effective tax credit where excise privilege taxes being generated are used, in part, to acquire and develop the Project Site is a material part of the transaction to the Developer.

## Regulatory Requirements

Arizona Revised Statutes (A.R.S.) §9-500.11 allows a municipality to enter into a “retail tax incentive agreement” as that term is defined in that statute. By having an agreement or set of agreements which comply with the provisions of this statute, the Developer may get credit for a portion of the sales, use, or transaction privilege taxes payable to the City in connection with the construction, development, or operation of retail development activities on the Project Site by Developer or its nominee(s). According to A.R.S. §9-500.11 (D1): “... the proposed tax incentive is anticipated to raise more revenue than the amount of the incentive within the duration of the agreement.” The statute also states that “A city or town shall not enter into a retail tax incentive agreement if the proposed tax incentive raises less revenue than the amount of the incentive...The finding made pursuant to subsection D, paragraph 1 of this section shall be verified by an independent third party before the city or town enters into the retail development

*incentive agreement.*" (A.R.S. §9-500.11 (F, H)). A copy of A.R.S. §9-500.11 is included as **Attachment A** to this Letter Report.

Article 9 §7 of the Arizona Constitution prohibits any subdivision of the State giving or lending its credit or making any donation, grant, or subsidy to any person, association, or corporation. Arizona has recognized that if (i) the public treasury receives benefits that meet or exceed the cost to the public treasury and (ii) if the expenditure of public funds is for a public purpose, then there is consideration for the transaction and the matter is not in violation of this provision of law.

## Retail Tax Incentive Agreement

So that the City will, at all times, raise more revenue than the amount of the credit provided by the Retail Tax Incentive Agreement, based on discussions with City Staff and the City's Legal Counsel it has been proposed that the Agreement will be structured as follows:

- A. Fifty percent (50%) of all transaction privilege taxes of the City as generated from businesses established on the Project Site will be rebated to Developer or its nominee or assignee until the sum of one million eight hundred and twenty-three thousand dollars (\$1,823,000.00) is paid.
- B. The Retail Tax Incentive Agreement will be conditioned upon the development of and the opening of the afore described "brand" hotel and "brand" restaurant on or before January 1, 2020.

## Economic Impact Analysis

### Methodology

To prepare the economic impact analysis, Willdan/Economists.com developed an impact model based upon certain inputs and assumptions, and utilizing appropriate local data sets. Based on our experience and knowledge of the industry, this model was developed to measure the impacts of development and many other activities that affect employment or expenditures in the economy.

Models such as this are particularly useful for measuring the total economic effects of a particular project or program, and yield estimates of the number and types of jobs created, the amount of wages associated with those jobs, and the total economic output or "final sales" generated within particular industries. This model relies upon economic "multipliers" that mathematically represent the relationship between the initial change in one sector of the economy and the corresponding effect of that change on other interdependent industry sectors, as well as the effect of that subsequent change on further sectors. These effects are commonly described as "direct," "indirect," and "induced" and are generally defined as follows:

- The "direct" effect is the initial change in economic activity from local payroll and construction expenditures in a specific industry or sector. For this Project, the direct effects to San Luis's zip code are the wages and other expenditures at the site (and with City businesses), during both construction and operation of the proposed facility.
- The "indirect" effect results from industry-industry transactions required to support the direct activity. This effect is a measure of the change in the output of suppliers linked to the industry being evaluated. For example, construction will result in an increase in purchases of building materials, engineering and consulting services, and other goods from "business to business" suppliers within the City.
- The "induced" effect consists of employee spending in the City by employees, created by direct

and indirect impacts, spending their earnings on local goods and services, such as food, clothing, real estate, education, health services, etc.

The total economic impact of the project is typically the sum of the direct, indirect, and induced impacts, offset by any economic loss related to the change in the use of the land. For purposes of this analysis, Willdan/Economists.com has only included the direct labor effects in the overall return to the City.

It should be noted that this modeling generally assumes that demand for goods and services by industries or households increases in relation to an increase in income, and that an increase in demand results in a proportional increase in local supply and employment. This implies that local suppliers satisfy this initial demand by increasing their output and hiring additional workers rather than shifting their goods or services from one set of consumers to another. This assumption may not hold in areas with tight labor or capital markets since suppliers may find it difficult to obtain these labor or material inputs or other resources necessary to expand production. Considering the scale of the proposed project and the size of the economic study area, this is not likely to be a factor for this analysis.

### Assumptions and Inputs

- **Direct Labor.** The Project will create both construction related jobs and ongoing jobs once construction is complete. The anticipated construction related and ongoing jobs by facility were provided by the City and the Developer. Willdan/Economists.com allocated these anticipated jobs as director/supervisor positions (25%) and staff positions (75%) as detailed on **Schedule 1**.
- **Direct Payroll.** Using the labor categories identified by both the Developer and the allocation between director/supervisor and staff positions, Willdan/Economists.com assigned an hourly labor cost to each anticipated labor category associated with the businesses on the Project Site. The hourly wage estimates were obtained from the Yuma MSA-2015 Occupational Employment & Hourly Wage Estimates, prepared by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, May 2016. The hourly wage rates were adjusted for inflation to the start of the projection period. The anticipated monthly payroll was then calculated based on the total staffing levels and anticipated hourly wages. This analysis is detailed on **Schedule 1**.
- Willdan/Economists.com projected that 70% of the jobs associated with the development of the Project Site and 80% of the jobs associated with the ongoing operations of the businesses at the Project Site would be local residents who currently reside within the San Luis City limits or would relocate within the City Limits. The resulting local direct labor and local direct payroll are identified on **Schedule 2**.
- Payroll costs are assumed to increase at 2.5 percent (2.5%) annually due to inflation and merit adjustments.
- Construction is estimated to take approximately 21 months.

### Summary of Economic Impacts

The anticipated Project is forecast to be the source of substantial economic benefits over the projection period. The total anticipated labor and associated payroll is shown below on **Table 1** as summarized **Schedule 2**.

**Table 1  
Summary of Economic Benefits**

Description	Labor Impacts	Annual Payroll Impacts (Rounded)
<b>Construction Related Jobs</b>		
Hotel	47.60	\$ 2,262,600
Restaurant	11.20	532,400
Convenience Store / Gas Station	10.50	507,000
<b>Total Construction Related Jobs</b>	<b>69.30</b>	<b>\$ 3,302,000</b>
<b>Ongoing Jobs</b>		
Hotel	13.60	\$ 380,600
Restaurant	11.20	364,500
Convenience Store / Gas Station	12.00	327,800
<b>Total Ongoing Jobs</b>	<b>36.80</b>	<b>\$ 1,072,900</b>

Notes: (1) Does not include inflationary impacts on wages.

## Fiscal Impact Analysis

### Methodology

The analysis of fiscal impacts focuses on the potential public revenues generated from utility services, transaction privilege taxes and the City's share of taxes including state income taxes. For purposes of this analysis, only those revenues to the City are included.

This analysis concentrates on direct and indirect impacts. While there are several levels of indirect impacts from projects such as this, the analysis focuses on the indirect impacts including, but not limited to the City's share of the state income tax and transaction privilege tax revenue.

The direct fiscal benefits consist of utility fees and tax revenues generated by the construction and operation of the proposed businesses on the Project Site. Indirect fiscal benefits include public revenues generated by direct payroll such as state income and transaction privilege tax revenues.

### Assumptions and Inputs

- **Projected Revenues Subject to Transaction Privilege Tax.** Revenue projections for the hotel, restaurant, and convenience store/gas station have been estimated by the Developer based on industry averages. The revenues are phased in over the first part of the projection period and include an annual inflationary adjustment of 2.0 percent (2.0%). The projected revenues are detailed on **Schedule 3**.
- As discussed previously, the agreement is expected to provide a credit of transaction privilege taxes

of 50 percent (50%) of the annual liability of the businesses located on the Project Site until a total of \$1.823 million credit has been received. **Schedule 3** presents the anticipated annual transaction privilege tax credit.

- Construction is expected to take approximately 21 months.
- Estimated construction costs have been provided by the City and the developer. Anticipated Transaction Privilege Taxes on the Construction portion of the project are estimated as follows:

Description	Amount
<b>Construction Costs</b>	
Hotel	\$ 7,106,056.00
Restaurant	1,600,000.00
Convenience Store / Gas Station	1,700,000.00
<b>Total Construction Costs</b>	<b>\$ 10,406,056.00</b>
<b>Amount Allocated to Purchases within the City</b>	<b>\$ 3,642,119.60</b>
<b>Total Projected Transaction Privilege Tax (Rounded)</b>	<b>\$ 145,700.00</b>
Allocated to Year 1	109,300.00
Allocated to Year 2	36,400.00

- **Utility System Revenues.** The City will receive water and wastewater revenue from the businesses on the project site. Based on our experience with the water and wastewater industry, we have developed flow projections based on the business type and size. Additionally, we have used the City's current utility system rates to project monthly and annual water and wastewater revenue from the project site. The annual water and wastewater rates are expected to be increased annually at 2.0 percent (2.0%). Detailed Utility System revenue projections are shown on **Schedule 4**.
- **City Share of State Income Taxes.** Willdan/Economists.com has assumed approximately 1.775 percent (1.775%) of every direct payroll dollar will be credited to the City by the State for State Income Tax.
- **In City Spending.** Willdan/Economists.com has projected that approximately 25% of payroll will be spent on goods and services within the City that are subject to the transaction privilege tax. It is assumed these expenditures will be at businesses other than those on the proposed project site.
- **Transaction Privilege Tax Rate.** The transaction privilege tax rate included in the projections is 4.0 percent (4.0%). This rate is assumed throughout the projection period.

### Summary of Fiscal Impacts

The results of the Fiscal Impacts Analysis are shown on **Schedules 5 and 6**. These projections are based on the assumptions discussed in the previous sections. In order for the City to move forward with the Project, the proposed tax incentive must provide more revenue to the City than the tax incentive. As can be seen on **Schedule 6**, the total projected revenues exceed the anticipated tax credit by over 196%.

It is anticipated that it will take approximately 15 years from the beginning of construction to reach the \$1.823 million tax credit cap. Over that period, the cumulative projected direct payroll anticipated is \$24,392,800.

**Schedule 6** presents the anticipated Tax Credit as well as the projected sources of income to the City provided by this project over the projection period. As summarized from **Schedule 6** and shown on **Table 2** below, the net benefit to the City over the projection period is anticipated to be \$1,755,700.

**Table 2**  
**Summary Projected Fiscal Benefits**

Description	Amount
<b>TRANSACTION PRIVILEGE TAX CREDIT</b>	<b>\$ (1,823,000)</b>
<b>PROJECTED SOURCES OF REVENUE</b>	
Transaction Privilege Taxes Paid	\$ 2,170,900
Utility System Revenue	730,900
Payroll Revenue Impacts	<u>676,900</u>
<b>TOTAL PROJECTED SOURCES OF REVENUE</b>	<b>\$ 3,578,700</b>
<b>NET BENEFIT TO CITY OVER PROJECTION PERIOD</b>	<b>\$ 1,755,700</b>

# Schedules

**Schedule 1**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Direct Labor and Payroll Assumptions**

Labor Classification	Total (1)	Director/ Supervisor	Staff
		FTEs	FTEs
<b>JOBS</b>			
<b>Construction Related Jobs</b>			
Hotel	68.00	17.00	51.00
Restaurant	16.00	4.00	12.00
Convenience Store / Gas Station	15.00	4.00	11.00
<b>Total Construction Related Jobs</b>	<b>99.00</b>	<b>25.00</b>	<b>74.00</b>
<b>Ongoing Jobs</b>			
Hotel	17.00	4.00	13.00
Restaurant	14.00	4.00	11.00
Convenience Store / Gas Station	15.00	4.00	11.00
<b>Total Ongoing Jobs</b>	<b>46.00</b>	<b>12.00</b>	<b>35.00</b>
<b>HOURS PER MONTH</b>			
<b>Construction Related Jobs</b>			
Hotel	10,880.00	2,720.00	8,160.00
Restaurant	2,560.00	640.00	1,920.00
Convenience Store / Gas Station	2,400.00	640.00	1,760.00
<b>Total Construction Related Jobs - Hours Per Month</b>	<b>15,840.00</b>	<b>4,000.00</b>	<b>11,840.00</b>
<b>Ongoing Jobs</b>			
Hotel	2,720.00	640.00	2,080.00
Restaurant	2,400.00	640.00	1,760.00
Convenience Store / Gas Station	2,400.00	640.00	1,760.00
<b>Total Ongoing Jobs - Hours Per Month</b>	<b>7,520.00</b>	<b>1,920.00</b>	<b>5,600.00</b>

**Schedule 1**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Direct Labor and Payroll Assumptions**

Labor Classification	Total (1)	Director/ Supervisor	Staff
		FTEs	FTEs
<b>EFFECTIVE HOURLY RATE (2)</b>			
<b>Construction Related Jobs</b>			
Hotel		\$ 42.39	\$ 18.88
Restaurant		\$ 42.39	\$ 18.88
Convenience Store / Gas Station		\$ 42.39	\$ 18.88
<b>Ongoing Jobs</b>			
Hotel		\$ 30.64	\$ 9.63
Restaurant		\$ 30.07	\$ 10.64
Convenience Store / Gas Station		\$ 25.88	\$ 9.99
<b>MONTHLY PAYROLL</b>			
<b>Construction Related Jobs</b>			
Hotel	\$ 269,361.60	\$ 115,300.80	\$ 154,060.80
Restaurant	63,379.20	27,129.60	36,249.60
Convenience Store / Gas Station	60,358.40	27,129.60	33,228.80
<b>Total Construction Related Jobs - Monthly Payroll</b>	<b>\$ 393,099.20</b>	<b>\$ 169,560.00</b>	<b>\$ 223,539.20</b>
<b>Ongoing Jobs</b>			
Hotel	\$ 39,640.00	\$ 19,609.60	\$ 20,030.40
Restaurant	37,971.20	19,244.80	18,726.40
Convenience Store / Gas Station	34,145.60	16,563.20	17,582.40
<b>Total Ongoing Jobs - Monthly Payroll</b>	<b>\$ 111,756.80</b>	<b>\$ 55,417.60</b>	<b>\$ 56,339.20</b>

Notes:

- (1) Total Direct Jobs As provided by the Developer and City of San Luis.
- (2) Yuma MSA-2015 Occupational Employment & Hourly Wage Estimates. Prepared by the Arizona Office of Employment and Population Statistics in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics, May 2016 (Mean Wage). Adjusted for Inflation.

**Schedule 2**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Direct Labor and Payroll Summary**

Labor Classification	Total	% Local	Amount Local
<b>JOBS</b>			
<b>Construction Related Jobs</b>			
Hotel	68.00	70%	47.60
Restaurant	16.00	70%	11.20
Convenience Store / Gas Station	15.00	70%	10.50
<b>Total Construction Related Jobs</b>	<b>99.00</b>		<b>69.30</b>
<b>Ongoing Jobs</b>			
Hotel	17.00	80%	13.60
Restaurant	14.00	80%	11.20
Convenience Store / Gas Station	15.00	80%	12.00
<b>Total Ongoing Jobs</b>	<b>46.00</b>		<b>36.80</b>
<b>MONTHLY PAYROLL</b>			
<b>Construction Related Jobs</b>			
Hotel	\$ 269,361.60	70%	\$ 188,553.12
Restaurant	63,379.20	70%	44,365.44
Convenience Store / Gas Station	60,358.40	70%	42,250.88
<b>Total Construction Related Jobs - Monthly Payroll</b>	<b>\$ 393,099.20</b>		<b>\$ 275,169.44</b>
<b>Ongoing Jobs</b>			
Hotel	\$ 39,640.00	80%	\$ 31,712.00
Restaurant	37,971.20	80%	30,376.96
Convenience Store / Gas Station	34,145.60	80%	27,316.48
<b>Total Ongoing Jobs - Monthly Payroll</b>	<b>\$ 111,756.80</b>		<b>\$ 89,405.44</b>

**Schedule 3**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Projected Revenues and Transaction Privilege Tax Credit**

Description	Construction	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2017	2018	2019	2020	2021	2022	2023	2024
<b>Projected Revenues Subject to Transaction Privilege Tax (1)</b>								
Hotel	(2)	\$ 446,800	\$ 893,500	\$ 1,367,100	\$ 1,787,000	\$ 1,822,700	\$ 1,859,200	\$ 1,896,400
Restaurant	(2)	520,000	1,040,000	1,591,200	2,080,000	2,121,600	2,164,000	2,207,300
Convenience Store / Gas Station	(2)	644,400	1,288,800	1,971,800	2,577,500	2,629,100	2,681,600	2,735,300
<b>Total Projected Revenues</b>		\$ 1,611,200	\$ 3,222,300	\$ 4,930,100	\$ 6,444,500	\$ 6,573,400	\$ 6,704,800	\$ 6,839,000
<b>Transaction Privilege Tax Revenue @ 4%</b>								
Hotel	(2)	\$ 17,900	\$ 35,700	\$ 54,700	\$ 71,500	\$ 72,900	\$ 74,400	\$ 75,900
Restaurant	(2)	\$ 20,800	\$ 41,600	\$ 63,600	\$ 83,200	\$ 84,900	\$ 86,600	\$ 88,300
Convenience Store / Gas Station	(2)	25,800	51,600	78,900	103,100	105,200	107,300	109,400
<b>Total Transaction Privilege Tax Revenue @ 4%</b>		\$ 64,500	\$ 128,900	\$ 197,200	\$ 257,800	\$ 263,000	\$ 268,300	\$ 273,600
<b>Proposed Tax Credit</b>								
Annual Percent		50%	50%	50%	50%	50%	50%	50%
Dollar Amount		\$ 32,300	\$ 64,500	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,200	\$ 136,800
<b>Cumulative Tax Credit</b>		\$ 32,300	\$ 96,800	\$ 195,400	\$ 324,300	\$ 455,800	\$ 590,000	\$ 726,800

**Notes:**

- (1) Based on Information Provided by the Developer and City of San Luis.
- (2) Construction Projected to last approximately 21 months.

**Schedule 3**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Projected Revenues and Transaction Privilege Tax Credit**

Description	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2025	2026	2027	2028	2029	2030	2031	2032
<b>Projected Revenues Subject to Transaction Privilege Tax (1)</b>								
Hotel	\$ 1,934,300	\$ 1,973,000	\$ 2,012,500	\$ 2,052,700	\$ 2,093,800	\$ 2,135,600	\$ 2,178,300	\$ 2,221,900
Restaurant	2,251,500	2,296,500	2,342,400	2,389,300	2,437,100	2,485,800	2,535,500	2,586,200
Convenience Store / Gas Station	2,790,000	2,845,800	2,902,700	2,960,700	3,020,000	3,080,400	3,142,000	3,204,800
<b>Total Projected Revenues</b>	<b>\$ 6,975,800</b>	<b>\$ 7,115,300</b>	<b>\$ 7,257,600</b>	<b>\$ 7,402,700</b>	<b>\$ 7,550,900</b>	<b>\$ 7,701,800</b>	<b>\$ 7,855,800</b>	<b>\$ 8,012,900</b>
<b>Transaction Privilege Tax Revenue @ 4%</b>								
Hotel	\$ 77,400	\$ 78,900	\$ 80,500	\$ 82,100	\$ 83,800	\$ 85,400	\$ 87,100	\$ 88,900
Restaurant	\$ 90,100	\$ 91,900	\$ 93,700	\$ 95,600	\$ 97,500	\$ 99,400	\$ 101,400	\$ 103,400
Convenience Store / Gas Station	111,600	113,800	116,100	118,400	120,800	123,200	125,700	128,200
<b>Total Transaction Privilege Tax Revenue @ 4%</b>	<b>\$ 279,100</b>	<b>\$ 284,600</b>	<b>\$ 290,300</b>	<b>\$ 296,100</b>	<b>\$ 302,100</b>	<b>\$ 308,000</b>	<b>\$ 314,200</b>	<b>\$ 320,500</b>
<b>Proposed Tax Credit</b>								
Annual Percent	50%	50%	50%	50%	50%	50%	50%	50%
Dollar Amount	\$ 139,600	\$ 142,300	\$ 145,200	\$ 148,100	\$ 151,100	\$ 154,000	\$ 157,100	\$ 58,800
<b>Cumulative Tax Credit</b>	<b>\$ 866,400</b>	<b>\$ 1,008,700</b>	<b>\$ 1,153,900</b>	<b>\$ 1,302,000</b>	<b>\$ 1,453,100</b>	<b>\$ 1,607,100</b>	<b>\$ 1,764,200</b>	<b>\$ 1,823,000</b>

**Schedule 4**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Fiscal Impact Assumptions**

Description	Construction	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2017	2018	2019	2020	2021	2022	2023	2024
<b>UTILITY SYSTEM REVENUE ASSUMPTIONS</b>								
<b>Hotel</b>								
Water								
Monthly Usage (Gallons)		200,000	280,000	370,000	400,000	400,000	400,000	400,000
Base Charge - 4" Meter (Includes 2,000 gallons usage)	\$	1,376.54	\$ 1,404.07	\$ 1,432.15	\$ 1,460.80	\$ 1,490.01	\$ 1,519.81	\$ 1,550.21
Volume Charge Per Thousand Gallons	\$	2.56	\$ 2.61	\$ 2.66	\$ 2.72	\$ 2.77	\$ 2.83	\$ 2.88
Total Volume Charge	\$	506.88	\$ 725.91	\$ 980.14	\$ 1,081.24	\$ 1,102.87	\$ 1,124.93	\$ 1,147.42
<b>Total Monthly Bill - Water</b>	<b>\$</b>	<b>1,883.42</b>	<b>\$ 2,129.98</b>	<b>\$ 2,412.29</b>	<b>\$ 2,542.04</b>	<b>\$ 2,592.88</b>	<b>\$ 2,644.74</b>	<b>\$ 2,697.63</b>
Wastewater								
Base Charge	\$	24.02	\$ 24.50	\$ 24.99	\$ 25.49	\$ 26.00	\$ 26.52	\$ 27.05
Volume Charge Per Thousand Gallons	\$	2.42	\$ 2.47	\$ 2.52	\$ 2.57	\$ 2.62	\$ 2.67	\$ 2.73
Total Volume Charge	\$	484.00	\$ 691.15	\$ 931.57	\$ 1,027.25	\$ 1,047.79	\$ 1,068.75	\$ 1,090.13
<b>Total Monthly Bill - Wastewater</b>	<b>\$</b>	<b>508.02</b>	<b>\$ 715.65</b>	<b>\$ 956.56</b>	<b>\$ 1,052.74</b>	<b>\$ 1,073.79</b>	<b>\$ 1,095.27</b>	<b>\$ 1,117.18</b>
<b>Restaurant</b>								
Water								
Monthly Usage (Gallons)		18,000	22,000	28,000	30,000	30,000	30,000	30,000
Base Charge - 1" Meter (Includes 2,000 gallons usage)	\$	57.47	\$ 58.62	\$ 59.79	\$ 60.99	\$ 62.21	\$ 63.45	\$ 64.72
Volume Charge Per Thousand Gallons	\$	2.56	\$ 2.61	\$ 2.66	\$ 2.72	\$ 2.77	\$ 2.83	\$ 2.88
Total Volume Charge	\$	40.96	\$ 52.22	\$ 69.25	\$ 76.07	\$ 77.59	\$ 79.14	\$ 80.72
<b>Total Monthly Bill - Water</b>	<b>\$</b>	<b>98.43</b>	<b>\$ 110.84</b>	<b>\$ 129.04</b>	<b>\$ 137.06</b>	<b>\$ 139.80</b>	<b>\$ 142.59</b>	<b>\$ 145.44</b>
Wastewater								
Base Charge	\$	24.02	\$ 24.50	\$ 24.99	\$ 25.49	\$ 26.00	\$ 26.52	\$ 27.05
Volume Charge Per Thousand Gallons	\$	2.42	\$ 2.47	\$ 2.52	\$ 2.57	\$ 2.62	\$ 2.67	\$ 2.73
Total Volume Charge	\$	43.56	\$ 54.30	\$ 70.50	\$ 77.04	\$ 78.58	\$ 80.16	\$ 81.76
<b>Total Monthly Bill - Wastewater</b>	<b>\$</b>	<b>67.58</b>	<b>\$ 78.81</b>	<b>\$ 95.49</b>	<b>\$ 102.53</b>	<b>\$ 104.58</b>	<b>\$ 106.68</b>	<b>\$ 108.81</b>
<b>Convenience Store / Gas Station</b>								
Water								
Monthly Usage (Gallons)		5,000	7,000	10,000	12,500	12,500	12,500	12,500
Base Charge - 1" Meter (Includes 2,000 gallons usage)	\$	57.47	\$ 58.62	\$ 59.79	\$ 60.99	\$ 62.21	\$ 63.45	\$ 64.72
Volume Charge Per Thousand Gallons	\$	2.56	\$ 2.61	\$ 2.66	\$ 2.72	\$ 2.77	\$ 2.83	\$ 2.88
Total Volume Charge	\$	7.68	\$ 13.06	\$ 21.31	\$ 28.53	\$ 29.10	\$ 29.68	\$ 30.27
<b>Total Monthly Bill - Water</b>	<b>\$</b>	<b>65.15</b>	<b>\$ 71.68</b>	<b>\$ 81.10</b>	<b>\$ 89.51</b>	<b>\$ 91.30</b>	<b>\$ 93.13</b>	<b>\$ 94.99</b>

**Schedule 4**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Fiscal Impact Assumptions**

Description	Construction	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2017	2018	2019	2020	2021	2022	2023	2024
<b>Wastewater</b>								
Base Charge	\$	24.02	\$ 24.50	\$ 24.99	\$ 25.49	\$ 26.00	\$ 26.52	\$ 27.05
Volume Charge Per Thousand Gallons	\$	2.42	\$ 2.47	\$ 2.52	\$ 2.57	\$ 2.62	\$ 2.67	\$ 2.73
Total Volume Charge	\$	12.10	\$ 17.28	\$ 25.18	\$ 32.10	\$ 32.74	\$ 33.40	\$ 34.07
<b>Total Monthly Bill - Wastewater</b>	<b>\$</b>	<b>36.12</b>	<b>\$ 41.78</b>	<b>\$ 50.17</b>	<b>\$ 57.59</b>	<b>\$ 58.74</b>	<b>\$ 59.92</b>	<b>\$ 61.12</b>
<b>PAYROLL CONVERSION FACTOR</b>								
City Share of State Shared Revenue		<b>0.01775</b>						
Percent of Payroll Dollar Used for In City Purchases		<b>0.25000</b>						
Transaction Privilege Tax Rate		<b>0.04000</b>						
Additional Transaction Privilege Tax Revenue		<u>0.01000</u>						
Total Payroll Conversion Factor		0.02775						

**Schedule 4**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Fiscal Impact Assumptions**

Description	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2025	2026	2027	2028	2029	2030	2031	2032
<b>UTILITY SYSTEM REVENUE ASSUMPTIONS</b>								
<b>Hotel</b>								
Water								
Monthly Usage (Gallons)	400,000	400,000	400,000	400,000	400,000	400,000	400,000	400,000
Base Charge - 4" Meter (Includes 2,000 gallons usage)	\$ 1,581.21	\$ 1,612.84	\$ 1,645.09	\$ 1,677.99	\$ 1,711.55	\$ 1,745.79	\$ 1,780.70	\$ 1,816.32
Volume Charge Per Thousand Gallons	\$ 2.94	\$ 3.00	\$ 3.06	\$ 3.12	\$ 3.18	\$ 3.25	\$ 3.31	\$ 3.38
Total Volume Charge	\$ 1,170.37	\$ 1,193.78	\$ 1,217.66	\$ 1,242.01	\$ 1,266.85	\$ 1,292.19	\$ 1,318.03	\$ 1,344.39
<b>Total Monthly Bill - Water</b>	<b>\$ 2,751.58</b>	<b>\$ 2,806.62</b>	<b>\$ 2,862.75</b>	<b>\$ 2,920.00</b>	<b>\$ 2,978.40</b>	<b>\$ 3,037.97</b>	<b>\$ 3,098.73</b>	<b>\$ 3,160.71</b>
Wastewater								
Base Charge	\$ 27.59	\$ 28.14	\$ 28.71	\$ 29.28	\$ 29.87	\$ 30.46	\$ 31.07	\$ 31.69
Volume Charge Per Thousand Gallons	\$ 2.78	\$ 2.84	\$ 2.89	\$ 2.95	\$ 3.01	\$ 3.07	\$ 3.13	\$ 3.19
Total Volume Charge	\$ 1,111.93	\$ 1,134.17	\$ 1,156.85	\$ 1,179.99	\$ 1,203.59	\$ 1,227.66	\$ 1,252.21	\$ 1,277.26
<b>Total Monthly Bill - Wastewater</b>	<b>\$ 1,139.52</b>	<b>\$ 1,162.31</b>	<b>\$ 1,185.56</b>	<b>\$ 1,209.27</b>	<b>\$ 1,233.45</b>	<b>\$ 1,258.12</b>	<b>\$ 1,283.28</b>	<b>\$ 1,308.95</b>
<b>Restaurant</b>								
Water								
Monthly Usage (Gallons)	30,000	30,000	30,000	30,000	30,000	30,000	30,000	30,000
Base Charge - 1" Meter (Includes 2,000 gallons usage)	\$ 66.01	\$ 67.34	\$ 68.68	\$ 70.06	\$ 71.46	\$ 72.89	\$ 74.34	\$ 75.83
Volume Charge Per Thousand Gallons	\$ 2.94	\$ 3.00	\$ 3.06	\$ 3.12	\$ 3.18	\$ 3.25	\$ 3.31	\$ 3.38
Total Volume Charge	\$ 82.34	\$ 83.98	\$ 85.66	\$ 87.38	\$ 89.13	\$ 90.91	\$ 92.73	\$ 94.58
<b>Total Monthly Bill - Water</b>	<b>\$ 148.35</b>	<b>\$ 151.32</b>	<b>\$ 154.35</b>	<b>\$ 157.43</b>	<b>\$ 160.58</b>	<b>\$ 163.79</b>	<b>\$ 167.07</b>	<b>\$ 170.41</b>
Wastewater								
Base Charge	\$ 27.59	\$ 28.14	\$ 28.71	\$ 29.28	\$ 29.87	\$ 30.46	\$ 31.07	\$ 31.69
Volume Charge Per Thousand Gallons	\$ 2.78	\$ 2.84	\$ 2.89	\$ 2.95	\$ 3.01	\$ 3.07	\$ 3.13	\$ 3.19
Total Volume Charge	\$ 83.39	\$ 85.06	\$ 86.76	\$ 88.50	\$ 90.27	\$ 92.07	\$ 93.92	\$ 95.79
<b>Total Monthly Bill - Wastewater</b>	<b>\$ 110.99</b>	<b>\$ 113.21</b>	<b>\$ 115.47</b>	<b>\$ 117.78</b>	<b>\$ 120.13</b>	<b>\$ 122.54</b>	<b>\$ 124.99</b>	<b>\$ 127.49</b>
<b>Convenience Store / Gas Station</b>								
Water								
Monthly Usage (Gallons)	12,500	12,500	12,500	12,500	12,500	12,500	12,500	12,500
Base Charge - 1" Meter (Includes 2,000 gallons usage)	\$ 66.01	\$ 67.34	\$ 68.68	\$ 70.06	\$ 71.46	\$ 72.89	\$ 74.34	\$ 75.83
Volume Charge Per Thousand Gallons	\$ 2.94	\$ 3.00	\$ 3.06	\$ 3.12	\$ 3.18	\$ 3.25	\$ 3.31	\$ 3.38
Total Volume Charge	\$ 30.88	\$ 31.49	\$ 32.12	\$ 32.77	\$ 33.42	\$ 34.09	\$ 34.77	\$ 35.47
<b>Total Monthly Bill - Water</b>	<b>\$ 96.89</b>	<b>\$ 98.83</b>	<b>\$ 100.81</b>	<b>\$ 102.82</b>	<b>\$ 104.88</b>	<b>\$ 106.98</b>	<b>\$ 109.12</b>	<b>\$ 111.30</b>

**Schedule 4**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Fiscal Impact Assumptions**

Description	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2025	2026	2027	2028	2029	2030	2031	2032
<b>Wastewater</b>								
Base Charge	\$ 27.59	\$ 28.14	\$ 28.71	\$ 29.28	\$ 29.87	\$ 30.46	\$ 31.07	\$ 31.69
Volume Charge Per Thousand Gallons	\$ 2.78	\$ 2.84	\$ 2.89	\$ 2.95	\$ 3.01	\$ 3.07	\$ 3.13	\$ 3.19
Total Volume Charge	\$ 34.75	\$ 35.44	\$ 36.15	\$ 36.87	\$ 37.61	\$ 38.36	\$ 39.13	\$ 39.91
<b>Total Monthly Bill - Wastewater</b>	<b>\$ 62.34</b>	<b>\$ 63.59</b>	<b>\$ 64.86</b>	<b>\$ 66.15</b>	<b>\$ 67.48</b>	<b>\$ 68.83</b>	<b>\$ 70.20</b>	<b>\$ 71.61</b>

**Schedule 5**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Fiscal Impact Details**

Description	Construction	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2017	2018	2019	2020	2021	2022	2023	2024
<b>TRANSACTION PRIVILEGE TAXES</b>								
Transaction Privilege Taxes on Construction Materials	\$ 109,300	\$ 36,400	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Transaction Privilege Taxes	(1) \$ 64,500	\$ 128,900	\$ 197,200	\$ 257,800	\$ 263,000	\$ 268,300	\$ 273,600	
Less: Proposed Tax Credit	(1) 32,300	64,500	98,600	128,900	131,500	134,200	136,800	
Transaction Privilege Tax Revenues Paid	\$ 32,200	\$ 64,400	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,100	\$ 136,800	
Total Transaction Privilege Taxed Paid	\$ 109,300	\$ 68,600	\$ 64,400	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,100	\$ 136,800
<b>UTILITY SYSTEM REVENUES</b>								
<b>Water</b>								
Hotel	(1) \$ 5,700	\$ 25,600	\$ 28,900	\$ 30,500	\$ 31,100	\$ 31,700	\$ 32,400	
Restaurant	(1) 300	1,300	1,500	1,600	1,700	1,700	1,700	
Convenience Store / Gas Station	(1) 200	900	1,000	1,100	1,100	1,100	1,100	
Total Water	\$ 6,200	\$ 27,800	\$ 31,400	\$ 33,200	\$ 33,900	\$ 34,500	\$ 35,200	
<b>Wastewater</b>								
Hotel	(1) \$ 1,500	\$ 8,600	\$ 11,500	\$ 12,600	\$ 12,900	\$ 13,100	\$ 13,400	
Restaurant	(1) 200	900	1,100	1,200	1,300	1,300	1,300	
Convenience Store / Gas Station	(1) 100	500	600	700	700	700	700	
Total Wastewater	\$ 1,800	\$ 10,000	\$ 13,200	\$ 14,500	\$ 14,900	\$ 15,100	\$ 15,400	
<b>Total Utility System Revenues</b>	(1) \$ 8,000	\$ 37,800	\$ 44,600	\$ 47,700	\$ 48,800	\$ 49,600	\$ 50,600	
<b>TAX CREDIT ANALYSIS</b>								
Proposed Tax Credit	(1) \$ 32,300	\$ 64,500	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,200	\$ 136,800	
<b>Less:</b>								
Transaction Privilege Taxes Paid	(1) 32,200	64,400	98,600	128,900	131,500	134,100	136,800	
Utility System Revenues	(1) 8,000	37,800	44,600	47,700	48,800	49,600	50,600	
Remaining Revenue to be Recovered	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Payroll Conversion Factor	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775
Minimum Additional Payroll Needed (in City)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Direct Demand Factor	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
<b>Additional Direct Payroll Needed</b>								
Annual	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Cumulative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Direct Payroll Anticipated</b>								
Annual	\$ 3,302,400	\$ 2,703,800	\$ 901,400	\$ 1,154,400	\$ 1,183,200	\$ 1,213,200	\$ 1,243,200	\$ 1,274,400
Cumulative	\$ 3,302,400	\$ 6,006,200	\$ 6,907,600	\$ 8,062,000	\$ 9,245,200	\$ 10,458,400	\$ 11,701,600	\$ 12,976,000

**Notes:**

(1) Construction Projected to last approximately 21 months.

**Schedule 5**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Fiscal Impact Details**

Description	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2025	2026	2027	2028	2029	2030	2031	2032
<b>TRANSACTION PRIVILEGE TAXES</b>								
Transaction Privilege Taxes on Construction Materials	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Transaction Privilege Taxes	\$ 279,100	\$ 284,600	\$ 290,300	\$ 296,100	\$ 302,100	\$ 308,000	\$ 314,200	\$ 320,500
Less: Proposed Tax Credit	139,600	142,300	145,200	148,100	151,100	154,000	157,100	58,800
Transaction Privilege Tax Revenues Paid	\$ 139,500	\$ 142,300	\$ 145,100	\$ 148,000	\$ 151,000	\$ 154,000	\$ 157,100	\$ 261,700
Total Transaction Privilege Taxed Paid	\$ 139,500	\$ 142,300	\$ 145,100	\$ 148,000	\$ 151,000	\$ 154,000	\$ 157,100	\$ 261,700
<b>UTILITY SYSTEM REVENUES</b>								
Water								
Hotel	\$ 33,000	\$ 33,700	\$ 34,400	\$ 35,000	\$ 35,700	\$ 36,500	\$ 37,200	\$ 37,900
Restaurant	1,800	1,800	1,900	1,900	1,900	2,000	2,000	2,000
Convenience Store / Gas Station	1,200	1,200	1,200	1,200	1,300	1,300	1,300	1,300
Total Water	\$ 36,000	\$ 36,700	\$ 37,500	\$ 38,100	\$ 38,900	\$ 39,800	\$ 40,500	\$ 41,200
Wastewater								
Hotel	\$ 13,700	\$ 13,900	\$ 14,200	\$ 14,500	\$ 14,800	\$ 15,100	\$ 15,400	\$ 15,700
Restaurant	1,300	1,400	1,400	1,400	1,400	1,500	1,500	1,500
Convenience Store / Gas Station	700	800	800	800	800	800	800	900
Total Wastewater	\$ 15,700	\$ 16,100	\$ 16,400	\$ 16,700	\$ 17,000	\$ 17,400	\$ 17,700	\$ 18,100
<b>Total Utility System Revenues</b>	<b>\$ 51,700</b>	<b>\$ 52,800</b>	<b>\$ 53,900</b>	<b>\$ 54,800</b>	<b>\$ 55,900</b>	<b>\$ 57,200</b>	<b>\$ 58,200</b>	<b>\$ 59,300</b>
<b>TAX CREDIT ANALYSIS</b>								
Proposed Tax Credit	\$ 139,600	\$ 142,300	\$ 145,200	\$ 148,100	\$ 151,100	\$ 154,000	\$ 157,100	\$ 58,800
Less:								
Transaction Privilege Taxes Paid	139,500	142,300	145,100	148,000	151,000	154,000	157,100	261,700
Utility System Revenues	51,700	52,800	53,900	54,800	55,900	57,200	58,200	59,300
Remaining Revenue to be Recovered	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Payroll Conversion Factor	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775
Minimum Additional Payroll Needed (in City)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Direct Demand Factor	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
<b>Additional Direct Payroll Needed</b>								
Annual	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Cumulative	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Direct Payroll Anticipated</b>								
Annual	\$ 1,306,800	\$ 1,339,200	\$ 1,372,800	\$ 1,407,600	\$ 1,442,400	\$ 1,478,400	\$ 1,515,600	\$ 1,554,000
Cumulative	\$ 14,282,800	\$ 15,622,000	\$ 16,994,800	\$ 18,402,400	\$ 19,844,800	\$ 21,323,200	\$ 22,838,800	\$ 24,392,800

**Schedule 6**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Projected Fiscal Impacts**

Description	Construction	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2017	2018	2019	2020	2021	2022	2023	2024
<b>PROJECTED TRANSACTION PRIVILEGE TAXES CREDIT (1)</b>								
Annual	\$ -	\$ 32,300	\$ 64,500	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,200	\$ 136,800
<b>Cumulative</b>	<b>\$ -</b>	<b>\$ 32,300</b>	<b>\$ 96,800</b>	<b>\$ 195,400</b>	<b>\$ 324,300</b>	<b>\$ 455,800</b>	<b>\$ 590,000</b>	<b>\$ 726,800</b>
<b>PROJECTED SOURCES OF REVENUE</b>								
Transaction Privilege Taxes Paid								
From Construction Purchases	\$ 109,300	\$ 36,400	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
From Businesses On Site (1)	\$ -	\$ 32,200	\$ 64,400	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,100	\$ 136,800
Total Annual	\$ 109,300	\$ 68,600	\$ 64,400	\$ 98,600	\$ 128,900	\$ 131,500	\$ 134,100	\$ 136,800
<b>Cumulative</b>	<b>\$ 109,300</b>	<b>\$ 177,900</b>	<b>\$ 242,300</b>	<b>\$ 340,900</b>	<b>\$ 469,800</b>	<b>\$ 601,300</b>	<b>\$ 735,400</b>	<b>\$ 872,200</b>
Utility System Revenue								
Annual	\$ -	\$ 8,000	\$ 37,800	\$ 44,600	\$ 47,700	\$ 48,800	\$ 49,600	\$ 50,600
<b>Cumulative</b>	<b>\$ -</b>	<b>\$ 8,000</b>	<b>\$ 45,800</b>	<b>\$ 90,400</b>	<b>\$ 138,100</b>	<b>\$ 186,900</b>	<b>\$ 236,500</b>	<b>\$ 287,100</b>
Payroll Revenue Impacts								
Annual Direct Payroll	\$ 3,302,400	\$ 2,703,800	\$ 901,400	\$ 1,154,400	\$ 1,183,200	\$ 1,213,200	\$ 1,243,200	\$ 1,274,400
Direct Demand Factor	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Payroll Conversion Factor (2)	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775
Total Revenue Payroll Impacts								
Annual	\$ 91,600	\$ 75,000	\$ 25,000	\$ 32,000	\$ 32,800	\$ 33,700	\$ 34,500	\$ 35,400
<b>Cumulative</b>	<b>\$ 91,600</b>	<b>\$ 166,600</b>	<b>\$ 191,600</b>	<b>\$ 223,600</b>	<b>\$ 256,400</b>	<b>\$ 290,100</b>	<b>\$ 324,600</b>	<b>\$ 360,000</b>
<b>TOTAL PROJECTED SOURCES OF REVENUE</b>								
Annual	\$ 200,900	\$ 151,600	\$ 127,200	\$ 175,200	\$ 209,400	\$ 214,000	\$ 218,200	\$ 222,800
<b>Cumulative</b>	<b>\$ 200,900</b>	<b>\$ 352,500</b>	<b>\$ 479,700</b>	<b>\$ 654,900</b>	<b>\$ 864,300</b>	<b>\$ 1,078,300</b>	<b>\$ 1,296,500</b>	<b>\$ 1,519,300</b>

Notes:

- (1) Assumes 50% credit of annual transaction privilege taxes due.
- (2) Includes City's share of additional State Tax as well as Transaction Privilege Taxes from additional consumer spending.

**Schedule 6**  
**City of San Luis Economic Impact Analysis**  
**San Luis Commercial Holdings, LLC Multi-Use Project**  
**Projected Fiscal Impacts**

Description	Year 8	Year 9	Year 10	Year 11	Year 12	Year 13	Year 14	Year 15
	2025	2026	2027	2028	2029	2030	2031	2032
<b>PROJECTED TRANSACTION PRIVILEGE TAXES CREDIT (1)</b>								
Annual	\$ 139,600	\$ 142,300	\$ 145,200	\$ 148,100	\$ 151,100	\$ 154,000	\$ 157,100	\$ 58,800
<b>Cumulative</b>	<b>\$ 866,400</b>	<b>\$ 1,008,700</b>	<b>\$ 1,153,900</b>	<b>\$ 1,302,000</b>	<b>\$ 1,453,100</b>	<b>\$ 1,607,100</b>	<b>\$ 1,764,200</b>	<b>\$ 1,823,000</b>
<b>PROJECTED SOURCES OF REVENUE</b>								
Transaction Privilege Taxes Paid								
From Construction Purchases	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
From Businesses On Site (1)	\$ 139,500	\$ 142,300	\$ 145,100	\$ 148,000	\$ 151,000	\$ 154,000	\$ 157,100	\$ 261,700
Total Annual	\$ 139,500	\$ 142,300	\$ 145,100	\$ 148,000	\$ 151,000	\$ 154,000	\$ 157,100	\$ 261,700
<b>Cumulative</b>	<b>\$ 1,011,700</b>	<b>\$ 1,154,000</b>	<b>\$ 1,299,100</b>	<b>\$ 1,447,100</b>	<b>\$ 1,598,100</b>	<b>\$ 1,752,100</b>	<b>\$ 1,909,200</b>	<b>\$ 2,170,900</b>
Utility System Revenue								
Annual	\$ 51,700	\$ 52,800	\$ 53,900	\$ 54,800	\$ 55,900	\$ 57,200	\$ 58,200	\$ 59,300
<b>Cumulative</b>	<b>\$ 338,800</b>	<b>\$ 391,600</b>	<b>\$ 445,500</b>	<b>\$ 500,300</b>	<b>\$ 556,200</b>	<b>\$ 613,400</b>	<b>\$ 671,600</b>	<b>\$ 730,900</b>
Payroll Revenue Impacts								
Annual Direct Payroll	\$ 1,306,800	\$ 1,339,200	\$ 1,372,800	\$ 1,407,600	\$ 1,442,400	\$ 1,478,400	\$ 1,515,600	\$ 1,554,000
Direct Demand Factor	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Payroll Conversion Factor (2)	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775	0.02775
Total Revenue Payroll Impacts								
Annual	\$ 36,300	\$ 37,200	\$ 38,100	\$ 39,100	\$ 40,000	\$ 41,000	\$ 42,100	\$ 43,100
<b>Cumulative</b>	<b>\$ 396,300</b>	<b>\$ 433,500</b>	<b>\$ 471,600</b>	<b>\$ 510,700</b>	<b>\$ 550,700</b>	<b>\$ 591,700</b>	<b>\$ 633,800</b>	<b>\$ 676,900</b>
<b>TOTAL PROJECTED SOURCES OF REVENUE</b>								
Annual	\$ 227,500	\$ 232,300	\$ 237,100	\$ 241,900	\$ 246,900	\$ 252,200	\$ 257,400	\$ 364,100
<b>Cumulative</b>	<b>\$ 1,746,800</b>	<b>\$ 1,979,100</b>	<b>\$ 2,216,200</b>	<b>\$ 2,458,100</b>	<b>\$ 2,705,000</b>	<b>\$ 2,957,200</b>	<b>\$ 3,214,600</b>	<b>\$ 3,578,700</b>

# Attachment A

9-500.11. Expenditures for economic development; requirements; definitions

(L05, Ch. 200, sec. 1)

A. In addition to any other powers granted to a city or town, the governing body of a city or town may appropriate and spend public monies for and in connection with economic development activities.

B. To fund economic development activities under this section, a city or town subject to the requirements of section 9-500.06 shall not impose a new fee or tax on a single specific industry or type of business.

C. Notwithstanding section 19-142, subsection B, a decision by the governing body involving an expenditure pursuant to this section shall not be enacted as an emergency measure and that decision is not effective for at least thirty days after final approval of the expenditure.

D. Before entering into a retail development tax incentive agreement, a city or town shall make a finding by a simple majority vote of the governing body without the use of consent calendar that includes both of the following:

1. That the proposed tax incentive is anticipated to raise more revenue than the amount of the incentive within the duration of the agreement.

2. That in the absence of a tax incentive, the retail business facility or similar retail business facility would not locate in the city or town in the same time, place or manner.

E. A city or town located in or within twenty-five miles of the exterior boundary of a metropolitan statistical area having a population of more than two million persons shall make a finding pursuant to subsection D of this section, by a two-thirds vote of the governing body.

F. A city or town shall not enter into a retail tax incentive agreement if the proposed tax incentive raises less revenue than the amount of the incentive.

G. A city or town shall present a status report of the revenues and expenses associated with the tax incentive every two years for the duration of the agreement in a public meeting.

H. The finding made pursuant to subsection D, paragraph 1 of this section shall be verified by an independent third party before the city or town enters into the retail development incentive agreement.

I. The adoption of the retail development tax incentive agreement shall be approved by a simple majority vote of the governing body without the use of consent calendar. For a city or town located in or within twenty-five miles of the exterior boundary of a metropolitan statistical area having a population of more than two million persons, the adoption of a retail development tax incentive agreement shall be approved by an affirmative vote of at least two-thirds of the governing body without the use of consent calendar.

J. A person or business entity receiving the retail development tax incentive agreement shall not finance the independent third party verification of the findings or have input into the selection of the independent third party verifying the findings.

K. A city or town shall adopt a notice of intent to enter into a retail development tax incentive agreement at least fourteen days before approving a retail development tax incentive agreement.

L. Subsection D of this section does not apply to tax incentives given to a business entity in an area that is designated by a city or town as a redevelopment project as defined in section 36-1471.

M. For the purposes of this section:

1. "Economic development activities" means any project, assistance, undertaking, program or study, whether within or outside the boundaries of the city or town, including acquisition, improvement, redevelopment, leasing or conveyance of improved or unimproved real or personal property or other activity, that the governing body of the city or town has found and determined will assist in the creation or retention of jobs or will otherwise improve or enhance the economic welfare of the inhabitants of the city or town.

2. "Expenditure" includes any waiver, exemption, deduction, credit, rebate, discount, deferral or other abatement or reduction of the normal municipal tax liability that otherwise applies to similar existing business entities and properties in that city or town, however denominated, computed or applied, and that is generally understood as an inducement to locate a business facility or other operation in the city or town.

3. "Metropolitan statistical area" means a geographical area consisting of cities, towns and other populated areas defined for federal statistical and census purposes by the United States office of management and budget with technical assistance from the United States bureau of the census.

4. "Retail" means the sale of tangible personal property, except the sale of tangible personal property to a person who is engaged in the business of selling such property.

5. "Retail development activities" means those economic development activities that involve the acquisition, improvement, leasing or conveyance of improved or unimproved real or personal property or other activity to facilitate the sale of goods at retail, including the sale of automobiles, or to facilitate other activities, including theater and restaurant development, that generate revenues that are subject to municipal transaction privilege taxation.

6. "Retail development tax incentive agreement" means an agreement between a city or town and a person engaged in or planning to engage in retail development activities within that city or town in which the city or town agrees to pay, refund, credit, rebate or otherwise provide to that person all or a portion of the sales, use or transaction privilege taxes payable to that city or town in connection with the construction, development or operation of the retail development activities.

[Arizona Revised Statutes Annotated](#)

[Constitution of the State of Arizona \(Refs & Annos\)](#)

[Article IX. Public Debt, Revenue, and Taxation](#)

A.R.S. Const. Art. 9 § 7

§ 7. Gift or loan of credit; subsidies; stock ownership; joint ownership

[Currentness](#)

Section 7. Neither the state, nor any county, city, town, municipality, or other subdivision of the state shall ever give or loan its credit in the aid of, or make any donation or grant, by subsidy or otherwise, to any individual, association, or corporation, or become a subscriber to, or a shareholder in, any company or corporation, or become a joint owner with any person, company, or corporation, except as to such ownerships as may accrue to the state by operation or provision of law or as authorized by law solely for investment of the monies in the various funds of the state.

**Credits**

Amended by [Laws 1998, S.C.R. 1007, § 3, approved election Nov. 3, 1998, eff. Nov. 23, 1998.](#)

A. R. S. Const Art. 9 § 7, AZ CONST Art. 9 § 7

Current through the Second Regular Session of the Fifty-Second Legislature (2016), and includes Election Results from the November 8, 2016 General Election

End of Document

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Arizona Revised Statutes Annotated

Title 9. Cities and Towns

Chapter 4. General Powers

Article 8. Miscellaneous (Refs & Annos)

A.R.S. § 9-500.05

§ 9-500.05. Development agreements; public safety; definitions

Currentness

- A.** A municipality, by resolution or ordinance, may enter into development agreements relating to property in the municipality and to property located outside the incorporated area of the municipality. If the development agreement relates to property located outside the incorporated area of the municipality, the development agreement does not become operative unless annexation proceedings to annex the property to the municipality are completed within the period of time specified by the development agreement or any extension of such time.
- B.** A development agreement shall be consistent with the municipality's general plan or specific plan, if any, as defined in § 9-461, applicable to the property on the date the development agreement is executed.
- C.** A development agreement may be amended, or cancelled in whole or in part, by mutual consent of the parties to the development agreement or by their successors in interest or assigns.
- D.** No later than ten days after a municipality enters into a development agreement, the municipality shall record a copy of the agreement with the county recorder of the county in which the property subject to the development agreement is located, and the recordation constitutes notice of the development agreement to all persons. The burdens of the development agreement are binding on, and the benefits of the development agreement inure to, the parties to the agreement and to all their successors in interest and assigns.
- E.** Section 32-2181 does not apply to development agreements under this section.
- F.** Notwithstanding any other law, a municipality may provide by resolution or ordinance for public safety purposes, and with the written consent of an owner of property that has been granted a development agreement pursuant to this section, an owner of a protected development right pursuant to chapter 11 of this title<sup>1</sup> or the owner of any other residential or commercial development subject to the supervision of a municipality pursuant to this title, for the application and enforcement of speed limits, vehicle weight restrictions or other safety measures on a private road that is located in any development in the municipality and that is open to and used by the public. A municipality may require payment from the property owner of the actual cost of signs for speed limits or other restrictions applicable on the private road, before their installation.
- G.** Notwithstanding § 19-142, subsection B, a decision by the governing body involving a development agreement may not be enacted as an emergency measure and that decision is not effective for at least thirty days after final approval of the development agreement.
- H.** In this section, unless the context otherwise requires:

1. “Development agreement” means an agreement between a municipality and a community facilities district pursuant to § 48-709, a landowner or any other person having an interest in real property that may specify or otherwise relate to any of the following:

- (a) The duration of the development agreement.
- (b) The permitted uses of property subject to the development agreement.
- (c) The density and intensity of uses and the maximum height and size of proposed buildings within such property.
- (d) Provisions for reservation or dedication of land for public purposes and provisions to protect environmentally sensitive lands.
- (e) Provisions for preservation and restoration of historic structures.
- (f) The phasing or time of construction or development on property subject to the development agreement.
- (g) Conditions, terms, restrictions and requirements for public infrastructure and the financing of public infrastructure and subsequent reimbursements over time.
- (h) Conditions, terms, restrictions and requirements for annexation of property by the municipality and the phasing or timing of annexation of property by the municipality.
- (i) Conditions, terms, restrictions and requirements of deannexation of property from one municipality to another municipality and the phasing or timing of deannexation of property from one municipality to another municipality.
- (j) Conditions, terms, restrictions and requirements relating to the governing body’s intent to form a special taxing district pursuant to title 48.<sup>2</sup>
- (k) Any other matters relating to the development of the property.

2. “Governing body” means the body or board which by law is constituted as the legislative body of the municipality.

3. “Municipality” means an incorporated city or town.

**Credits**

Added by [Laws 1988, Ch. 320, § 2](#). Amended by [Laws 1997, Ch. 113, § 1](#); [Laws 2005, Ch. 105, § 1](#).

**Footnotes**

<sup>1</sup> Section 9-1201 et seq.

<sup>2</sup> Section 48-101 et seq.

A. R. S. § 9-500.05, AZ ST § 9-500.05

Current through legislation effective May 3, 2017 of the First Regular Session of the Fifty-Third Legislature (2017)

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[Arizona Revised Statutes Annotated](#)

[Title 9. Cities and Towns](#)

[Chapter 4. General Powers](#)

[Article 8. Miscellaneous \(Refs & Annos\)](#)

A.R.S. § 9-500.11

§ 9-500.11. Expenditures for economic development; requirements; definitions

Currentness

<Text of section as amended by [Laws 2005, Ch. 200, § 1](#). See, also, section amended by [Laws 2005, Ch. 105, § 2](#).>

- A.** In addition to any other powers granted to a city or town, the governing body of a city or town may appropriate and spend public monies for and in connection with economic development activities.
- B.** To fund economic development activities under this section, a city or town subject to the requirements of [§ 9-500.06](#) shall not impose a new fee or tax on a single specific industry or type of business.
- C.** Notwithstanding [§ 19-142, subsection B](#), a decision by the governing body involving an expenditure pursuant to this section shall not be enacted as an emergency measure and that decision is not effective for at least thirty days after final approval of the expenditure.
- D.** Before entering into a retail development tax incentive agreement, a city or town shall make a finding by a simple majority vote of the governing body without the use of consent calendar that includes both of the following:
1. That the proposed tax incentive is anticipated to raise more revenue than the amount of the incentive within the duration of the agreement.
  2. That in the absence of a tax incentive, the retail business facility or similar retail business facility would not locate in the city or town in the same time, place or manner.
- E.** A city or town located in or within twenty-five miles of the exterior boundary of a metropolitan statistical area having a population of more than two million persons shall make a finding pursuant to subsection D of this section, by a two-thirds vote of the governing body.
- F.** A city or town shall not enter into a retail tax incentive agreement if the proposed tax incentive raises less revenue than the amount of the incentive.
- G.** A city or town shall present a status report of the revenues and expenses associated with the tax incentive every two years for the duration of the agreement in a public meeting.
- H.** The finding made pursuant to subsection D, paragraph 1 of this section shall be verified by an independent third party before the city or town enters into the retail development incentive agreement.

**I.** The adoption of the retail development tax incentive agreement shall be approved by a simple majority vote of the governing body without the use of consent calendar. For a city or town located in or within twenty-five miles of the exterior boundary of a metropolitan statistical area having a population of more than two million persons, the adoption of a retail development tax incentive agreement shall be approved by an affirmative vote of at least two-thirds of the governing body without the use of consent calendar.

**J.** A person or business entity receiving the retail development tax incentive agreement shall not finance the independent third party verification of the findings or have input into the selection of the independent third party verifying the findings.

**K.** A city or town shall adopt a notice of intent to enter into a retail development tax incentive agreement at least fourteen days before approving a retail development tax incentive agreement.

**L.** Subsection D of this section does not apply to tax incentives given to a business entity in an area that is designated by a city or town as a redevelopment project as defined in § 36-1471.

**M.** For the purposes of this section:

1. “Economic development activities” means any project, assistance, undertaking, program or study, whether within or outside the boundaries of the city or town, including acquisition, improvement, redevelopment, leasing or conveyance of improved or unimproved real or personal property or other activity, that the governing body of the city or town has found and determined will assist in the creation or retention of jobs or will otherwise improve or enhance the economic welfare of the inhabitants of the city or town.

2. “Expenditure” includes any waiver, exemption, deduction, credit, rebate, discount, deferral or other abatement or reduction of the normal municipal tax liability that otherwise applies to similar existing business entities and properties in that city or town, however denominated, computed or applied, and that is generally understood as an inducement to locate a business facility or other operation in the city or town.

3. “Metropolitan statistical area” means a geographical area consisting of cities, towns and other populated areas defined for federal statistical and census purposes by the United States office of management and budget with technical assistance from the United States bureau of the census.

4. “Retail” means the sale of tangible personal property, except the sale of tangible personal property to a person who is engaged in the business of selling such property.

5. “Retail development activities” means those economic development activities that involve the acquisition, improvement, leasing or conveyance of improved or unimproved real or personal property or other activity to facilitate the sale of goods at retail, including the sale of automobiles, or to facilitate other activities, including theater and restaurant development, that generate revenues that are subject to municipal transaction privilege taxation.

6. “Retail development tax incentive agreement” means an agreement between a city or town and a person engaged in or planning to engage in retail development activities within that city or town in which the city or town agrees to pay, refund, credit, rebate or otherwise provide to that person all or a portion of the sales, use or transaction privilege taxes payable to that city or town in connection with the construction, development or operation of the retail development activities.

**Credits**

Added as § 9-500.10 by [Laws 1994, Ch. 280, § 2](#). Renumbered as § 9-500.11. Amended by [Laws 2005, Ch. 200, § 1](#).

A. R. S. § 9-500.11, AZ ST § 9-500.11

Current through legislation effective May 3, 2017 of the First Regular Session of the Fifty-Third Legislature (2017)

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## AGENDA ITEM REVIEW FORM

### Special City Council Meeting

6.B.

**Meeting Date:** 06/07/2017

**Department Head:** Olivia Jenkins, Human Resources Director, Human Resources Department

**Submitted By:** Olivia Jenkins, Human Resources Director, Human Resources Department

**Action Requested:** Motion  
Resolution

---

#### ITEM:

Discussion and possible action to approve Resolution No. 1196. A resolution of the Mayor and City Council of the City of San Luis, Arizona adopting and directing the City Manager and/or his designee to follow the document titled "Classification Study and Final Report"; approving an appeal process; and providing for severability. **(Olivia Jenkins, Human Resources Director; Jennifer Ramos, CPS HR Consultant)**

#### SUMMARY:

During the annual City budget workshop at the end of April this year, Council asked the status of the Salary Study and directed the Human Resources Director to move forward with phase one of the study, the classification phase. This item is in follow-up to that directive.

**Background:** During 2016-2017 annual City budget workshop, Council instructed the City Administration to pursue and engage in a second salary study in view of the concerns expressed by city employees. Among other challenges to the prior survey, it seemed the employees had not understood the importance of verifying the accuracy of their job descriptions with what duties they actually perform. The 2016 Salary Survey conducted by Public Sector Personnel was not adopted. The city selected Cooperative Personnel Services (CPS) HR Consulting to conduct a second survey. The 2017 Salary Survey provided additional communication during the process such as conducting interviews with some employees. CPS HR Consulting took care to meet with employees to be sure of the accuracy of the study they filled out. The first phase of the study is complete and the recommendations are similar to those made by the previous consultant.

**Staff Recommendation:** In anticipation and preparation for fiscal year 2017-2018, Human Resources is requesting authorization to accept recommendations made in first phase of the Study conducted by CPS HR Consulting which is the classifications of positions. The Classification Study and Final Report has reviewed concepts and structure of all positions; revised and defined classification structure with fewer departments reporting directly to the City Administrator. Study recommendations includes Title changes, Reclassification, and New Class for various positions; the recommended classification structure involves reorganization, as well for several departments. These changes will provide more efficiency for the City. In addition, staff recommends that there be an investigation and appeal process available for individual challenges to the new classification plan so that the City will have an organized and fair way to address any potential errors in classification.

#### RECOMMENDATION / SUGGESTED MOTION:

**I MOVE TO APPROVE AND ADOPT RESOLUTION NO. 1196.**

**Supporting information not attached to the Agenda Item Review Form:**

Classification Study Final Report

**Document to be Recorded?:** Yes

**City Clerk's Office**

---

**Fiscal Impact**

**IS THERE FISCAL IMPACT ASSOCIATED WITH THIS ITEM:** No

**CITY/STATE/FEDERAL FUNDS:** N/A

**TOTAL:** N/A

**BUDGETED AMOUNT:** N/A

**AVAILABLE AMOUNT TO TRANSFER:** N/A

**ACCT NAME & GL#/REMAINING BALANCE BEFORE PURCHASE:** N/A

**FISCAL IMPACT STATEMENT (IF THIS IS A BUDGET TRANSFER, YOU MUST ATTACH THE BUDGET ADJUSTMENT FORM):**

This is phase one of the the Salary Study dealing only with classification of positions and not pay-rates.

---

**Attachments**

Resolution No. 1196

Classification Study Final Report

San Luis Class Structure Overview

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# *Resolution*

OFFICE OF THE  
MAYOR  
CITY OF SAN LUIS

**No. 1196**

**A RESOLUTION OF THE MAYOR AND CITY COUNCIL OF THE CITY OF SAN LUIS, ARIZONA ADOPTING AND DIRECTING THE CITY MANAGER AND/OR HIS DESIGNEE TO FOLLOW THE DOCUMENT TITLED “CLASSIFICATION STUDY AND FINAL REPORT”; APPROVING AN APPEAL PROCESS; AND PROVIDING FOR SEVERABILITY.**

**BE IT RESOLVED** by the Mayor and City Council of the City of San Luis, Arizona, as follows:

**Section 1. Findings of City Council**

Because it has been many years since the classification of positions have been brought into line with current employment norms, it is determined that it is necessary to make certain changes to the Classification Plan and Organizational Chart in order to provide more efficient delivery of services to the residents of the City of San Luis.

**Section 2. Adopt and Follow Study**

The City Council hereby adopts and directs the City Manager and/or his designee to follow the document titled “Classification Study and Final Report” prepared by CPS HR Consulting and attached as Exhibit A. Exhibit A is hereby referenced, incorporated and made a part of this resolution as if fully set in this Resolution No. 1196. The City Manager and/or his designee is hereby directed to take any and all actions as may be necessary including but not limited to amending the Classification Plan and Organizational Chart in order to put the recommendations of the study in Exhibit A into effect.

**Section 3. Appeal Process**

CPS HR Consulting will conduct investigations and appeal processes for individual challenges to the Classification Plan. Based on the results of the investigation and appeal process, CPS HR Consulting will make recommendations to the Human Resources Department and the City Manager. The City Manager will consider the recommendations of CPS HR Consulting and the recommendations of the Human Resources Department and in the best interest of the City of San Luis will make the final determination as to the individual classifications challenged as is authorized by Section HR-3-01 of the City of San Luis Personnel Policies adopted by City Council by Resolution No. 750 and within limits of the authority of the City Manager under San Luis City Code Section 31.20.

**Section 4. Future Classification Changes**

As authorized by Section HR-3-01 of the City of San Luis Personnel Policies adopted by the City Council by Resolution No. 750 and within the limits of the authority of the City Manager under San Luis City Code Section 31.20, future changes can be made under this authority.

**Section 5. Severability**

If any section, clause, phrase or portion of this resolution is for any reason held to be invalid or unconstitutional by the decision of any court of competent jurisdiction, such decision shall not affect the validity of the remaining portions thereof.

**PASSED, ADOPTED and APPROVED** by the Mayor and City Council of the City of San Luis, Arizona, this \_\_\_\_ day of June, 2017.

\_\_\_\_\_  
Gerardo Sanchez, Mayor

**ATTEST:**

**APPROVED AS TO FORM:**

\_\_\_\_\_  
Sonia Cornelio, City Clerk

\_\_\_\_\_  
Kay Marion Macuil, City Attorney

Private and Confidential

# Classification Study Final Report City of San Luis, Arizona

June 1, 2017

SUBMITTED BY:

*Jennifer Ramos, Principal Consultant*

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Barbara Santos

Justin Tucker

Support Staff:

Sarah Williams



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# I. Background

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The City of San Luis (City) retained CPS HR Consulting (CPS HR) to conduct an agency wide classification and total compensation study. This project was divided into two phases. The first phase was a classification review of all positions in the City, and the second phase compensation. This report is limited to the classification study which covers two hundred fifty-five (255) positions allocated to one hundred ten (110) classifications. The compensation study is currently in progress and includes 10 labor market agencies and 40 benchmark positions. A separate compensation report will be provided to the City.

The purpose of the classification study was to (1) review the current classification structure and related concepts; (2) prepare concepts for a more defined classification structure with fewer departments and an appropriate number of direct reports to the City Administrator (recommended to undergo a title change to City Manager as a result of the classification study); (3) revise existing classification specifications to reflect current and accurate duties; (4) prepare new classification specifications as necessary; and (5) ensure that all positions are properly allocated within the newly proposed classification structure.

Other background considerations were identified during the kickoff meeting with City management. For example, Arizona is a right to work state. The City of San Luis does not have unions; however, Police and Fire personnel can belong to a union. There was a general concern around a lack of career ladders or clear paths for employees to advance in the City's existing classification structure. The Parks and Recreation Department was specifically mentioned as lacking an effective career ladder. Managers also expressed an interest in addressing specialty positions that combine multiple tasks since functions tend to be combined in smaller cities; they mainly want to understand how to appropriately classify, supervise, and reward specialty classifications.

Another important factor to consider is that the City underwent a previous classification and compensation study in 2015. Results of the 2015 study were not implemented. During discussions, City management attributed the outcome to a lack of clear communication from the prior consultant to City employees about the purpose and goal of the study. In addition, there was a lack of clear rationale for classification changes and lack of transparency in defining and distinguishing between classification levels (i.e., Director and Manager). A group of seven employees were dissatisfied with the outcome of the study and went directly to City Council to express concern. City Council threw out the study.

The 2017 Classification Study Report is designed to provide an overview of study tasks, a conceptual framework for the analysis, a recommended classification structure that involves reorganization, specific allocation analyses, recommendations for each of the positions encompassed in this study, and the next steps in the study.

The classification study encompasses two hundred fifty-five (255) positions allocated to one hundred ten (110) classifications which are listed below:

### Existing Classification Structure at Onset of Study

ACCOUNTANT	DEPUTY CITY CLERK	MECHANIC
ACCOUNTING SPECIALIST	DRIVER	METER READER
ADMIN. ASSISTANT	ECONOMIC DEVELOPMENT ASSISTANT	METER READER TECHNICIAN
ADMIN. COORDINATOR	ELECTRICIAN	OFFICE CLERK
ANIMAL CONTROL OFFICER	ENGINEER	OFFICE MANAGER
ASISSTANT FINANCE DIRECTOR	ENGINEER /PARAMEDIC	OFFICE SUPPORT SPECIALIST
ASSISTANT CITY ATTORNEY	EVIDENCE TECHNICIAN	PARAMEDIC
ASSISTANT PARKS AND RECS DIRECTOR	FINANCE DIRECTOR	PARKS AND RECREATION DIRECTOR
ASSISTANT PLANNER	FIRE CAPTAIN	PARKS SUPERVISOR
ASSISTANT PW DIRECTOR	FIRE CHIEF	PLANNING TECHNICIAN
ASSISTANT TO COUNCIL/PIO	FIRE ENGINEER	POLICE ADMINISTRATOR
BAILIFF JUDICIAL SPECIALIST	FIRE INSPECTOR	POLICE CORPORAL
BUILDING INSPECTOR	FIREFIGHTER	POLICE LIEUTENANT
BUILDING MAINTENANCE TECHNICIAN	FIREFIGHTER /PARAMEDIC	POLICE OFFICER
BUILDING PERMIT TECH	FIREFIGHTER /PARAMEDIC PART	POLICE RECORDS CLERK
BUILDING PLANS EXAMINER	FIREFIGHTER EMT	POLICE SERGEANT
BUILDING SAFETY DIRECTOR	G.I.S. TECHNICIAN	PUBLIC WORKS DIRECTOR
CHIEF COURT CLERK	GRAPHIC ARTS SPECIALIST	PURCHASING AGENT III
CHIEF OF POLICE	HEAD LIFEGUARD	PW EQUIPMENT OPERATOR
CHIEF OPERATOR	HR MANAGER	PW HEAVY EQUIPMENT OPERATOR
CITY ATTORNEY	HR PROGRAM & TRAINING COORDINATOR	PW MAINTENANCE SUPERVISOR
CITY CLERK	HR SENIOR ANALYST	PW SUPERVISOR
CITY PROSECUTOR	HR SPECIALIST	RECREATION COORDINATOR
CODE ENFORCEMENT POLICE OFFICER	HR TECHNICIAN	RECREATION INTERN (SEASONAL)
COMMUNICATION OFFICER	I.T. MANAGER	RECREATION SPECIALIST
COMMUNICATIONS COORDINATOR	I.T. TECHNICIAN	RISK AND PROPERTY MANAGER
COMMUNITY DEVELOPMENT DIRECTOR	INTERIM CITY ADMINISTRATOR	SECRETARY
COMPLIANCE OFFICER	LEAD CUSTODIAN	SENIOR AIDE
CONTRACTS & GRANTS COORDINATOR	LEAD MECHANIC	SENIOR AIDE /DRIVER
COURT ADMINISTRATOR	LEGAL SECRETARY	SENIOR SERVICES DIRECTOR
COURT CLERK I	LIFEGUARD	SWIMMING POOL COORDINATOR
COURT CLERK II	MAGISTRATE	TRANSIT ENFORCEMENT OFFICER
COURT COMPLIANCE OFFICER	MAINTENANCE TECH/IRRIGATION	UTILITIES DIRECTOR
CREW LEADER SUPERVISOR	MAINTENANCE TECH. (PARKS)	WASTEWATER PLANT OPERATOR
CUSTODIAN	MAINTENANCE TECH. (PW)	WASTEWATER SUPERVISOR
CUSTOMER SERVICE I	MANAGEMENT ANALYST	WATER SUPERVISOR
		WATER SYSTEMS OPERATOR

## II. Overview/Status of Study Tasks

---

In conducting the classification study, CPS HR completed the following steps beginning in August 2016 through today:

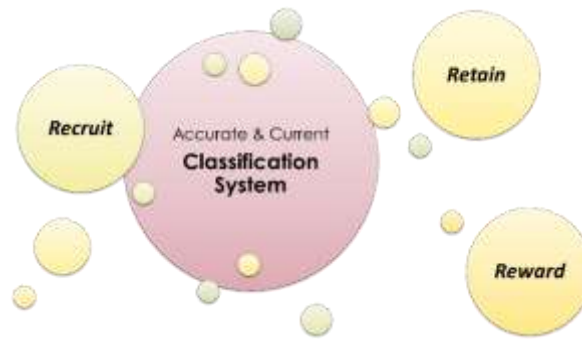
1. CPS HR Project Manager, Jennifer Ramos, conducted introductions by telephone with the Interim City Administrator (recommended title change to City Manager), Tadeo De La Hoya, and Senior Human Resources Analyst, Maria Sabori, who served as the client's point of contact at the onset of classification study.
2. Received and reviewed background documents provided by the City and listed below in order to prepare for the kickoff meeting and to formulate a strategy for the classification study.
  - *Organization Charts*
  - *Classification Specifications (electronic copies)*
  - *Relevant Policies and Procedures*
  - *Previous classification studies*
3. On September 1, 2016, conducted a formal kickoff presentation with City management, consisting of the Interim City Administrator (recommended title change to City Manager) and his direct reports (i.e., department heads and human resources team), at the City of San Luis City Hall, to ensure all were apprised of the study goals, processes, and objectives; and had an opportunity to express any concerns or questions regarding the study.
4. On September 19 & 20, 2016, conducted four employee orientation sessions over a two-day period, three in English and one in Spanish, to ensure all employees were apprised of the study goals, processes, and objectives. Employees also had an opportunity to express any concerns or questions regarding the study. Sessions in English and Spanish were recorded and made available on the City's intranet for employees unable to attend in-person sessions. These steps were added to mitigate any concerns about a lack of transparency or clear purpose/goals related to the study.
5. Coordinated the distribution of a customized Position Description Questionnaire (PDQ) that was pre-populated with existing job description information to make the completion process easier and faster for employees in response to concerns below.
  - Previous study PDQ was too difficult for some staff to understand
  - Previous study PDQ took a long time to complete (form was a fillable Word document)
  - Some staff only speak Spanish, or prefer to communicate in Spanish, particularly anything that is written or related to documenting their job duties
6. CPS HR created English and Spanish versions of PDQs for select classifications in order to better assist employees during the data collection process.

7. Collected job related information from City employees from late September through October 2016. The PDQ section of report below provides more details about the three-tiered approach (collecting data from employees, supervisors, and department heads).
8. In October 2016, CPS HR conducted a detailed analysis of each position through the analysis of individual Position Description Questionnaires (PDQs), organization charts, and relevant background materials.
9. On November 7 & 8, 2016, three CPS project consultants (Alfred Bingham, Barbara Santos, and Justin Tucker) conducted job evaluation interviews in Spanish/English with a representative sample of study incumbents to gain a comprehensive understanding of work performed. Interview schedules are included in the appendix of this report and include respective date, incumbent names, departments, and class titles.
10. Analyzed all of the information gathered via the PDQs and job evaluation interviews to identify the scope and level of work performed by each employee as well as the typical duties and the requisite knowledge, skills, abilities, and other job-related characteristics required to perform the work assigned to each position.
11. In December 2016, developed Draft Preliminary Classification Concepts for review by the City. Presented a classification structure consistent with the classification concepts encompassing the total bodies of work being performed within the study positions. CPS HR recommendations were based on information provided by employees during the PDQ collection phase, interviews, and follow-up research or data clarification with Human Resources.
12. On December 13 & 14, 2016, presented the Draft Preliminary Classification Concepts, which included reorganization recommendations, via Skype to Tadeo De La Hoya and Maria Sabori. During this meeting, the CPS Project Manager learned that Tadeo De La Hoya was formally appointed to City Administrator (recommended title change to City Manager), and the City was in the process of recruiting for the vacant Director of Human Resources position.
13. On January 11, 2017, presented the Draft Preliminary Classification Concepts, which included reorganization recommendations, via Skype meeting to the City Administrator (recommended title change to City Manager), Tadeo De La Hoya, newly appointed Director of Human Resources, Olivia Jenkins, and Senior HR Analyst, Maria Sabori.
14. Created and proposed a classification specification template for approval by the Director of Human Resources prior to developing standardized and updated classification specifications.
15. Developed new classification specifications supporting the classification structure recommendations. The classification specifications include/describe appropriate job definitions; distinguishing characteristics; supervision received and exercised; essential duties and responsibilities statements; knowledge, skills, and abilities statements; minimum qualifications; any required training, certifications, or licenses; and physical and environmental working conditions.

16. Based on classification concepts and proposed class structure, CPS HR developed allocation recommendations for each position to an appropriate classification.
17. Developed a Draft Classification Report for the City's review and comments and submitted initial report via email on March 3, 2017.
18. Received questions and feedback from the City on March 13, 2017. These items were considered in CPS HR's final recommendations.
19. Prepared and submitted a Revised Draft Classification Report via email on March 28, 2017.
20. CPS HR Project Manager, Jennifer Ramos, conducted a series of meetings during the month of May with HR Director, Olivia Jenkis, and Senior HR Analyst, Maria Sabori, in order to explain the methodologies and rationale used by CPS HR to arrive at classification recommendations.
21. CPS HR and the City determined a need for a Formal Appeal Process given the unforeseen delays in reaching final classification recommendations. The appeal process will allow employees to receive a preliminary classification notice and option to submit an appeal for reconsideration. Appeals would require justification in the form of new job related information, significant changes to duties, or operational changes in order to support a subsequent review.
22. On May 12, 2017, CPS HR Project Manager, Jennifer Ramos, sent an Appeal Process Proposal outlining two scope of work and pricing options via email to the HR Director, Olivia Jenkins, for consideration.
23. On May 23, 2017, CPS HR submitted a Revised Draft Classification Report to the City for review.
24. CPS HR prepared and submitted the Final Classification Report to the City on June 1, 2017.

## Conceptual Framework

An accurate and up-to-date classification system provides an organization with the necessary tools to make administrative, fiscal, and human resources decisions. Further, accurate and current classification specifications provide the fundamental and essential building blocks for successful administration of recruitment, performance management, compensation, and succession planning programs. In addition to providing the basis for human resources management and process decisions, position classification can also effectively support systems of administrative and fiscal control. Identifying positions based on a well-defined and orderly classification system supports organizational planning, operational efficiency and effectiveness, budget analysis and preparation, and various other administrative functions. The goal of this study is provide the City with a classification structure that will allow you to effectively recruit, retain, and reward employees in your organization in a competitive and sustainable way.



The classification analysis, as applied to the positions in this study, relies upon sound principles of job evaluation. Using these principles, CPS HR has developed a classification structure for the City that is designed to reflect distinct differences in the levels and types of work being performed based on established classification factors and concepts. This section of the report presents the conceptual framework for the methods used by CPS HR in developing a proposed classification plan for the City's positions. To facilitate review, this section is organized as follows:

- General Guidelines and Definitions
- Nature of the Work
- Classification Job Family Levels

## General Guidelines and Definitions

### ***Standard Classification Factors***

In order to develop classification/allocation recommendations, each position is first analyzed based on the nature of work performed. Nature of work refers to the occupation, profession, or subject matter field in which each position falls. Positions are initially grouped according to the broad occupational nature of their overall functions, responsibilities, similarities in their employment requirements and the purposes for which they exist. Positions that perform work of a similar nature are considered to be in the same "job family". Common examples are clerical, technical, professional, supervisor, and manager job families discussed further in the Nature of Work section below. Within each job family, the level of the position is then determined by evaluating it against the following factors:

- **Decision Making** - This consists of (a) the decision-making responsibility and degree of independence or latitude that is inherent in the position, and (b) the impact of the decisions (i.e., within their department and/or agencywide).
- **Scope and Complexity** - This defines the breadth and difficulty of the assigned function or program responsibility inherent in the classification.
- **Contact with Others required by the Job** - This measures (a) the types of contacts, and (b) the purpose of the contacts.

- **Supervision Received and Exercised** - This describes the level of supervision received from others and the nature of supervision provided to other workers. It relates to the independence of action inherent in a position and the types of classifications supervised (i.e., trade, clerical, technical, professional, sworn, etc.).
- **Knowledge, Skills, and Abilities** - This defines the knowledge, skills, and abilities necessary to perform assigned responsibilities.

These factors were carefully and consistently applied during the analysis of each position included in the scope of the study. Not all factors will be as pertinent to all positions and each factor is analyzed in accordance with the importance of that particular factor to the kind of job under study.

### ***Whole-Job Analysis***

For purposes of this study, CPS HR used a whole-job analysis approach. This approach compares jobs with one another on the basis of an overall evaluation of difficulty or performance. The entire position, including the skills required, the decision-making authority, the scope, the magnitude of work, and the accountability for results, is compared as a whole to other positions.

In addition, the overall scope of work (or whole job) is used to determine consistency in titling protocol across departments and allocation to appropriate levels by looking at the holistic impact agencywide. Later in the compensation study phase, job matching with labor market benchmark positions will be done based on the entire scope of work performed. Title changes alone do not necessarily change the scope of work, and consequently should not impact pay.

### ***Broad and Narrow Classifications***

Key to the City's classification structure is the judicious use of broad and narrow classification concepts. It is easy to determine that several positions belong to the same class when the duties are *identical*. However, in practice, the duties and responsibilities of positions need not be identical in order to be placed in a common classification. Classification plans generally establish classifications based on a determination of "sufficient similarity". However, within an individual organization, sufficient similarity can be interpreted to coincide with the goals and philosophy of the organization. For example, a broad interpretation recognizes positions that share a core set of classification factors, but accepts substantial variation between positions resulting in varied assignments within each broad classification. In contrast, a narrow interpretation might create separate narrow classifications to address such variations.

### ***Point in Time Analysis***

A classification study primarily captures the essential nature of positions at a single point in time. Therefore, recommendations cannot be based upon all possible future changes, particularly in a rapidly changing environment where organizational needs, technologies, and skill requirements are continuously evolving. CPS HR has, to the extent possible, designed a classification structure in line with the City's current goals, recognizing that other additions or deletions from the plan may take place in

the future. Overall, the proposed classification structure, the levels of work, and the functional areas identified should provide a strong foundation for the City's future classification needs.

### ***Preponderant Duties***

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

### ***Sufficient Similarity***

It is easy to see that several positions belong to the same class when the duties are identical. In practical application, however, the duties and responsibilities of positions need not be identical in order to be placed in a common class. Instead, classification plans generally place positions into classes based on a determination of "sufficient similarity". However, within an individual organization "sufficient similarity" can be broadly or narrowly interpreted. A broad interpretation recognizes positions that share a core set of classification factors, but accepts substantial variation between positions, resulting in broad classes. In contrast, a narrow interpretation might create separate narrow classes to address such variations.

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

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

### ***Classification of the Position, Not the Employee***

Position classifications should be consistent regardless of who holds the position. As such, a classification study process classifies positions, not individual employees. Furthermore, classification does not consider the capabilities of individual employees or the efficiency and effectiveness of an incumbent. It is not a measure of how well an individual employee performs but of the actual duties assigned to the employee. Thus, classification is not a tool to reward individual achievement, nor should classifications be created simply to reward length of service.

### ***Position versus Classification***

Position and classification are two words that are often thought of as interchangeable; but in fact have very different meanings. In a classification plan, a position is an assigned a group of duties and responsibilities performed by one person. Sometimes the word “job” is appropriately used in the place of position.

In contrast, a classification may contain only one position, or may consist of a number of positions. When there are several positions assigned to one classification, it means that the same title is appropriate for each position because the scope, level, duties, and responsibilities of each position assigned to the classification are sufficiently similar (but not necessarily identical); the same core knowledge, skills, and other requirements are appropriate for all positions; and the same salary range is equitable for all positions.

### ***Classification versus Allocation***

Classification is the process of identifying and describing the various kinds of work in an organization and grouping similar positions together based on job family, classification series, and classification distinctions. Allocation is more specifically tied to the placement and/or budgeting of positions within an organization. Thus, agencies may allocate a position within an organization based on the results of the classification analysis for that position.

## Nature of the Work

The overall nature of the work being performed provides the basis for establishing job families and helps group positions according to their overall functions and responsibilities. Classifications in a job family usually have similarities in their employment requirements that may support career progression. However, classes in the same job family may still require different levels of education, experience, skill, effort, or responsibility. These categories are described as follows:

- **“Clerical/Administrative” classifications** are responsible for general office and/or secretarial support work such as document production/processing, filing, reception, calendar maintenance, scheduling, and data entry. Typically, incumbents use a basic knowledge of office procedures, combined with basic reading, writing and arithmetic skills.

An example in the City of San Luis of a clerical/administrative classification series is the proposed Office Assistant (new), Administrative Assistant (existing), and Administrative Coordinator (existing). All three classifications require different levels of skill that support career progression within a job family.

- **“Technical” classifications** describe work that requires specialized skills, knowledge, and abilities typically acquired through practical experience. Positions at the technician level typically require incumbents to have, at a minimum, a high school diploma or GED equivalency, combined with college level courses or possession of technical certification.

Some examples in the City of San Luis of technical classifications are: Human Resources Technician, Accounting Specialist, Planning Technician, Information Technology Technician, and Recreation Specialist which are all existing classifications.

- **“Professional” classifications** typically describe work that is analytical in nature, requiring incumbents to possess sufficient knowledge and skill to analyze problems, evaluate and identify alternatives, and recommend/implement actions/solutions; such knowledge is usually obtained through possession of a four-year college degree and/or a highly specialized and advanced type of training.

Some examples of professional classifications in the City of San Luis are: Human Resources Analyst (new), Management Analyst (existing), Accountant II (new), and Associate Planner (new). Recommendation of new professional level classifications will create a career path, promote professional growth, and help with retention efforts.

## Classification Job Family Levels

Within each classification series, there may be a classification at every level or only at selected levels. The levels within a job family reflect the organization and should be tailored to that organization’s needs and priorities. The categories recommended are described as follows:

- **Entry-level** classifications are designed to provide an on-the-job training opportunity to an employee who has limited or no directly related work experience and is not yet performing the full range of work assigned to the journey-level class. In some cases, positions, which are limited in scope and/or performing duties that are more basic, may be permanently allocated to the entry-level.
- **Journey-level** classifications recognize positions that perform the full range of tasks typically assigned to positions in the job family. A journey-level position requires incumbents to be fully competent in performing assigned duties. The designation of “II” may be used for a journey-level classification.
- **Advanced journey-level** classifications describe positions with specialized and/or advanced duties beyond the journey level of the series. Incumbents may also serve as a lead. Leads are typically responsible for providing lead supervision to a group of at least three lower level staff while performing the day-to-day work themselves. The designation of “III” or “Senior” may be used for an advanced level classification.
- **Supervisor-level** classifications describe full, first-line supervisory positions that plan, assign, supervise, and formally review the work of subordinates; assist in program development and management; and assume responsibility for a variety of personnel actions in such areas as performance evaluation, training, selection, transfers, approval of leave, and recommending disciplinary measures. Supervisors may assist in budget development and administration related

to specific programs or assigned functions. Supervisors serve in a participatory role related to budget oversight; however, budget control is typically the responsibility of higher level managers. Most “working” supervisors also spend a substantial portion of their time performing the more difficult and complex work of the section or unit. At least 50% or more of time in the role should be designated to supervisory responsibility and duties.

- **Manager-level** classifications describe positions with full responsibility for planning, organizing, directing staff, and controlling a major unit or division within a department. Managers are also responsible for the strategic planning and budget oversight for assigned functions and/or operations of a department. The designation of “Manager” usually denotes the responsibility of leading and managing multiple City employees often in varying classification levels within an assigned area (i.e., trade, clerical, technical, professional, sworn, etc.), and generally does not include volunteers.

As previously noted, lead workers and supervisor or manager-levels and above are typically responsible for providing varying degrees of oversight to a group of at least three lower level staff as part of their regular responsibility and duties.

- **Executive Manager-level** classifications describe positions with full responsibility for staffing through direct and indirect reports, oversight of multiple units or divisions within a department, management and strategic planning of all department activities, projects, and budgets; as well as, working with other City departments to forecast, plan for, and coordinate services provided to internal and external City customers. The designation of “Director”, “Assistant Director”, or “Chief” in public safety roles may be used for an executive manager level classification.

### III. Classification Study Methodology

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CPS uses a variety of different processes to gather the information needed to conduct the classification study. The first step in this process was to review background material in order for CPS Consultants to become more familiar with San Luis’s organizational structure and culture. CPS HR reviewed the following materials: classification specifications, salary schedules, personnel rules, and previous classification study documents. These materials helped to provide the framework for understanding the subsequent information to be collected. To gather additional information, CPS utilized Position Description Questionnaires (PDQs) and employee interviews. The methodologies used during each of these information collection phases is discussed below.

#### Position Description Questionnaires (PDQs)

To evaluate each individual position, CPS HR developed a PDQ. The PDQ is a questionnaire that gathers information on: essential job functions; budgetary responsibility; supervision given and received;

decision making responsibility; knowledge, skills, and abilities; minimum job education and experience requirements; services provided and work products produced. The PDQs were administered to the employees in late September through October 2016. On September 21, 2016, PDQs were distributed electronically and/or by hand by the City's HR Department to all Directors and then to employees. The designated deadline for submitting completed PDQs to the City's HR Department was October 7, 2016. Employees were provided additional time to submit PDQs beyond the stated deadline prior to interviews being scheduled.

Employee's received pre-populated PDQs, meaning certain sections of the PDQ contained information from the current classification specifications. Other sections of the PDQ were not populated. All areas allowed for notes and additional comments. Pre-populating the PDQs with the information available in the classification specifications allowed employees to complete the PDQs in a more expedient manner while facilitating the comparison between the classification specifications and the actual job duties performed by the employees. A copy of both the English and Spanish pre-populated Recreation Coordinator PDQs are included in [Appendix A](#) as an example.

To maintain the integrity of the classification process and validate responses, the PDQ submission process included a three-tiered approach. First, incumbents in classifications responded to the PDQ. Once completed, the employees forwarded their PDQs to their supervisors. Then the participating employees' immediate supervisors and/or managers reviewed and signed the PDQs to affirm that all pertinent information was correctly captured. Then a higher-level manager or department director performed a final review of the PDQ. The three-tiered process was performed to ensure that employees and supervisors and/or managers had a voice in the process and the information provided was accurate and complete. It is important to note that supervisors and/or managers were allowed to provide comments on any information provided by the employee within the relevant section of the PDQ. However, supervisors/managers were not allowed to edit any of the PDQ content submitted by the employee.

The City's Human Resources staff forwarded the completed PDQs to CPS HR in October 2016. A total of 235 completed PDQs were received. CPS HR Consultants thoroughly reviewed each PDQ to understand the duties and responsibilities assigned to each position. CPS HR Consultants also compared the information obtained in the PDQs to the position's classification specifications to identify: (1) classification specifications that needed to be updated or modified; (2) any employees that seem to be working out of class; and (3) considerations for reorganization that would lead to greater operational efficiency within the City.

### ***Interviews of Incumbents and Supervisors***

CPS HR consultants interviewed ninety-four (94) City employees over a two-day period. The employee interviews were conducted on November 7 and 8, 2016 at the City offices. Each employee interview

lasted 30-50 minutes depending on whether it was an individual or focus group interview. A list of those individuals interviewed is included in [Appendix B](#). CPS HR consultants used the interviews to gather additional information about the interviewee's job duties and responsibilities, the sequencing of job tasks, job requirements, and the circumstances in which the interviewee interacts with coworkers, external clients, contractors, and the public. The interviews were also used to clarify information the interviewee provided on the PDQ. The criteria used to select which employees would be interviewed were varied, including: (1) employees who marked on their PDQ that the job summary listed in the position's classification specifications did not adequately described their position's general responsibilities; (2) documented disagreements on the PDQ between employees and their supervisor and/or manager; (3) incomplete information on the PDQ; (4) positions in which either the employee or his/her supervisor documented on the PDQ that the employee might be working out of class; and (5) unique positions in which the interviewer wanted to gather additional information.

## IV. Classification Study Observations

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In review of the classification structure, there were a number of initial observations, which were further analyzed and were ultimately reconciled in the recommended structure. A summary of each is listed below based on the recommended structure:

### **1. Number of Direct Reports to the City Administrator (City Manager):**

The City Administrator (recommended for a title change to City Manager) currently has seventeen (17) direct reports in the existing structure, which includes fourteen (14) department heads and three (3) administrative staff. Additionally, because of vacancies at the department head level in other departments, the Fleet Services and Facilities functions currently operate as standalone departments and report directly to him. At the onset of study, the Director of Human Resources classification did not exist. There was a vacancy in the Human Resources Manager position causing the City Administrator to assume the duties set forth in the personnel rules relating to grievances and discipline, which is a time consuming and highly involved role in the City. It is in the best interest of the City for effective and efficient operations to consider a reorganization that would redistribute management responsibility and oversight at the highest level of the organization.

There are several options to be considered for reducing the number of direct reports to the City Administrator, primarily reassigning smaller functions or operations in the City that should not qualify as stand alone departments under larger department oversight. The smaller functions operate more like a division based on the scope of oversight and number of assigned staff. Reassignment of certain functions makes sense operationally and will mirror labor market agencies commonly structured in a similar manner.

### ***Reorganization/Reassignment Recommendations***

#### **a. Assign Fleet Services to the Director of Public Works**

Fleet Services currently has an Office Manager overseeing Fleet Services and Facility Maintenance in a combined role. However, the two functions are recommended to be separated into different departments. As a result of this study, CPS HR recommends assigning Fleet Services to the Director of Public Works and assigning Facility Maintenance to the Director of Parks and Recreation.

The Office Manager's duties are primarily supervisory in nature, not managerial, according to the incumbent's PDQ and subsequent interview with the direct supervisor. CPS HR recommends that the current Office Manager oversee Facility Maintenance and be reclassified to Facilities Supervisor (a classification formerly used in the existing structure that

was frozen but not abolished). The single-incumbent Office Manager classification would be eliminated as a result of the classification study.

The Fleet Services function includes one (1) Lead Mechanic, three (3) Mechanics, and one newly allocated position of (1) Office Assistant. The staff would be supervised by a Public Works Supervisor. The Fleet Services function currently supports fleet maintenance in Police, Fire and Public Works. Fleet Services is often found in the Public Works Department within other cities, as the maintenance of Heavy Equipment is generally more complex than maintenance of automobiles. The City's Fire Department appears to perform routine maintenance of Fire equipment internally.

**b. Assign Facility Maintenance to the Director of Parks and Recreation**

As noted above, the Facility Maintenance function is currently combined with Fleet Services with a single-incumbent Office Manager classification overseeing both functions. However, the two functions are recommended to be separated into different departments. As a result of this study, CPS HR recommends assigning Fleet Services to the Director of Public Works and assigning Facility Maintenance to the Director of Parks and Recreation.

The Facilities function fits in the Parks and Recreation Department, since the department already has responsibility for maintenance of parks and grounds. The incumbent would move into Parks and Recreation and supervise one (1) Lead Custodian, five (5) Custodians, and one (1) Business Maintenance Technician. CPS HR recommends that the current Office Manager role be reclassified to Facilities Supervisor (a classification formerly used in the existing structure that was frozen but not abolished), and then eliminate the Office Manager classification.

**c. Assign Senior Services to the Director of Parks and Recreation**

The Senior Services function reports to the City Administrator (recommended for a title change to City Manager) in the existing classification structure. Since the current Senior Services Director is related to the City Administrator, functional supervision rested with the Utilities Director, which has since become a vacant position. The City's former Utilities Director was selected as the Director of Human Resources (HR) as a result of a formal recruitment process in December 2016. The question over having a family member as a direct report became a conflict of interest, so the City Administrator relinquished supervision of the Senior Services Director and oversight of the Senior Services function to the Utilities Director. Currently, the City's HR Director maintains oversight of the Senior Services function.

CPS HR recommends that the Senior Services function be assigned to the Parks and Recreation Department, since the department provides services to different members of the community in varying age groups (i.e., Aquatic Center, Cultural Center, and Youth Center).

The Senior Services function appears similar in scope of work to other functions in the Parks and Recreation Department.

Although the Senior Services function provides essential services through its own food division, tax return services, utility assistance program, and community assistance for the elderly, with considerable City impact; the function relies heavily on volunteers for administrative coordination and execution. The current Senior Services Director supervises three City employees: one part-time (1) Senior Services Assistant, one (1) Senior Services Assistant/Driver, and one (1) Driver. CPS HR recommends retitling Senior Services Director to Senior Services Manager to account for the difference in scope of work and decision making related to program management, while drawing a clear distinction between the Director of Parks and Recreation and other department heads, which require a higher level of responsibility.

The Director level across the City encompasses broader oversight often involving multiple functional areas/divisions and numerous direct reports in trade, administrative, clerical, and professional level positions.

**d. Assign Utilities to the Director of Finance and Retitle to Billing and Collections**

CPS HR recommends assigning Utilities to the Director of Finance, since the majority of duties performed by classifications in the Utilities function are fiscal in nature. The Utilities function is responsible for the billing and collection of utility charges and other fees. A second function is to install small (<1" D) meters, perform turn on and shut offs, deliver delinquent notices (approximately 1,000 of the 7,000 connections receive a disconnect notice each month) and read meters.

Another consideration was to move Utilities under the Public Works Department since coordination and planning is required between the functions related to Utility development issues (i.e., new water service, meter installations, etc.), as well as coordination of customer complaints and issues related to water service problems, service shutoffs and other matters.

After extensive review of information collected during the PDQ and interview process, the consulting team determined that the Utilities function is best suited in the Finance Department due to the billing and collections functions. The division is also recommended to be titled "Billing and Collections" rather than Utilities, since it handles primarily billing and collections and is a more accurate reflection of the work performed.

In addition, CPS HR recommends retitling Utilities Director to Billing and Collections Manager to account for the difference in scope of work and decision making related to management of division functions, while drawing a clear distinction between the Director of Finance and other department heads, which require a higher level of responsibility. CPS HR recommends assigning the Billing and Collections Manager (former Utilities Director) to Finance. The Billing

and Collections Manager will manage the following direct reports: one (1) Administrative Coordinator; two (2) Meter Reader Technicians; one (1) Meter Reader; two (2) Accounting Specialists; two (2) Customer Service Representatives; one (1) Office Assistant; and one (1) Business License Specialist (New), former Administrative Coordinator position proposed to become a specialized class and moved from the Planning & Zoning Department assigned to Finance.

As previously noted, the Director level across the City encompasses broader oversight often involving multiple functional areas/divisions and numerous direct reports in trade, administrative, clerical, and professional level positions. Drawing a distinction between levels and titles to accurately reflect the scope of responsibility is appropriate and necessary.

**e. Assign Business License Specialist (from Administrative Coordinator to specialized class) from Planning and Zoning to the Director of Finance.**

In the existing classification structure, there is an Administrative Coordinator role in the Planning and Zoning Department that performs 20% front office administrative support and 10% management support, as well as specialized building permit and business license duties approximately 70% of time. CPS HR consultants reviewed the incumbent's PDQ and subsequent interview notes, and recommend the creation and implementation of a new specialized classification titled: Business License Specialist. The new classification will move from a broad clerical/administrative classification to a specialized classification. It is important to note that the specialized class is a single-incumbent position that becomes a standalone classification separate from any existing class series. Therefore, the class is not evaluated as a lower level position than the Administrative Coordinator, but rather distinct and separate based on the essential functions and duties of the position.

Furthermore, CPS HR recommends assigning the new classification to Billing and Collections.<sup>1</sup>As noted above, the Utilities function is recommended to be assigned to the Finance Director as a result of the classification study findings and proposed reorganizations. This recommended change will help facilitate greater operational efficiency in the City and create reporting relationships that allow for the work to be carried out effectively in the Finance Department.

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<sup>1</sup> The Utilities Billing & Collections function was separated from the Public Works Department back in the mid 2000s. Since then the function was first under Finance (then called Administrative Services) and then about seven to eight years ago was assigned directly under Administration. One of the main responsibilities has been to bill and collect for the services provided by Public Works divisions – water, wastewater, and solid waste, and provide customer service in relation to new service accounts, but it also collects other city departments fees as well.

**f. Assign Geographic Information System (GIS) Specialist from Information Technology to Planning and Zoning**

In the existing classification structure, the City's only Geographic Information System (GIS) Specialist reports to the Information Technology Department. CPS HR recommends reassigning the GIS Specialist class to the Planning and Zoning Department due to the nature of work performed while primarily carrying out planning functions. This recommended change will help facilitate greater operational efficiency in the City and create reporting relationships that allow for the work to be carried out effectively in the Planning and Zoning Department.

**g. Information Technology (IT) continue reporting to the City Administrator**

Information Technology will continue to report to the City Administrator. The IT Manager will have oversight of the following staff: one (1) Senior IT Technician (New), one (1) IT Technician, and one (1) Graphics & Media Specialist. As noted above, the GIS Specialist class is recommended to move to the Planning and Zoning Department due to the nature of work performed in relation to primarily carrying out planning functions.

**h. Community Development continue reporting to the City Administrator and Title Change to Economic Development Manager**

The Community Development function will continue to report to the City Administrator. However, CPS HR recommends retitling Community Development Director to Economic Development Manager to account for the scope of work and decision making involved, while drawing a clear distinction with the level of responsibility held by department heads designated with the Director title. The Director level across the City encompasses broader oversight often involving multiple functional areas/divisions and numerous direct reports in trade, administrative, clerical, and professional level positions.

**2. Director Roles:**

The use of the Director title is inconsistent in the City. Some incumbents with Director titles have the oversight, decision making, scope and complexity, contact with others, and level of supervision that warrant designation to this level. However, others are assigned to the same Director title level with noticeably less oversight and impact in the identified allocation factors. One distinction that was considered carefully was the size and scope of Director oversight in the Finance, Public Works, and Parks and Recreation departments in comparison to the roles of the Senior Services Director and Community Development Director. Both of the latter classifications are recommended to be Managers as a result of the allocation factors considered and explanation noted in this section.

Some exceptions do exist in the City that do not require the use of Director titling. For example, the leadership team includes individuals who are not designated as department heads but who perform a critical and highly visible function, and whose input is important, including the City Prosecutor and the Court Administrator. Those roles have distinct titles that correspond with legal industry standards for high level roles. However, as with the roles of Senior Services Director and Community Development Director, the allocation to a director title is not appropriate and creates inconsistency in defining oversight and span of control.

Since the distinction between director and manager is not clearly defined in the existing City structure, CPS HR recommends clearly distinguishing the director level by reserving the title only for executive manager roles in the City. Executive managers tend to be department heads with full responsibility for staffing through direct and indirect reports, oversight of multiple units or divisions within a department, management and strategic planning of all department activities and projects, especially oversight of the entire department budget. As an example, although a Manager may assist in budgeting responsibilities (i.e., be accountable for preparation, submittal, and expenditures) within a division or functional program; the Department Director maintains control and responsibility for the entire department budget.

Any classification title changes from Director to Manager will not necessarily change the scope and complexity of work in the existing job description, as the core duties and responsibilities would be the same as before but draw a distinction between the Department Director. CPS Consultants realize how a perceived downgrade in title from Director to Manager could impact morale. However, the need for fairness in application of the definition should be considered from a liability and operational perspective, and consequently the titling protocol for director should be used judicially and correctly. There is a strong distinction between a Director level role, which has strategic and budgetary oversight often over multiple functions within a department, than a Manager role often responsible for oversight of a single program or functional unit. A whole job analysis approach that accounts for reporting relationships, scope and complexity of work, consequence of error in decision making, level of supervision received and exercised, and other key allocation factors should be used collectively to determine consistency in titling protocol across departments. Allocation to appropriate levels should be the primary goal of the City by looking at title impacts agencywide.

### **3. Lack of Effective Career Ladders:**

CPS created career ladders where deemed appropriate to create a promotional path for employees. The creation of another classification level within a series is denoted in red and with the word “New” in parenthesis in the proposed organization chart included in the next few pages. The new classifications listed below in alphabetical order, include:

- Accountant II (in a career series with the feeder class of Accountant I)

- Associate Planner (in a career series with the feeder class of Assistant Planner)
- Building Inspector II (in a career series with the feeder class of Building Inspector I)
- Human Resources Analyst (in a career series serving as the feeder class into Senior Human Resources Analyst)
- Senior Information Technology Technician (in a career series with the feeder class of Information Technology Technician)

The creation of new levels was primarily in professional classification series and dispersed across the City in multiple departments, not confined to one job family. This impacts retention efforts as employees see a future and growth potential within the City.

#### **4. Title Consistency:**

CPS recommends consistent use of title definitions to accurately represent classification levels within a job family and/or placement within the organization beyond the Director level. In initial review of the existing classification structure, titles were used inconsistently in a variety of classes regardless of entry, journey, or advanced journey and did not correctly or consistently represent the scope of work and degree of responsibility. Title consistency helps promote succession planning as staff can clearly recognize positions that are entry, advance, supervisor, etc. in correlation to the designated title.

One example of recommended changes that will allow for titling consistency in the City exists in the Finance Department with the Purchasing Coordinator, Contracts and Grants Coordinator, and Risk Property Coordinator. All three are specialized professional level classifications that perform distinct and essential operational functions within the Finance Department. In terms of minimum qualifications, all require a Bachelor of Arts degree and varying years of experience, which will be banded to a similar number of years as noted below.

- Purchasing Coordinator – two (2) years of experience
- Contracts & Grants Coordinator – three (3) years of experience
- Risk Management Coordinator – three (3) years of experience

Despite the slight variation in years of experience required, it is important to note that all three classifications report to the Finance Director. All three classifications perform specialized work, operate with a high degree of independence in carrying out work, and do not supervise any direct reports.

**5. Job Descriptions:**

All classification specifications will require revisions to fit the new template format approved by the Human Resources Director. Some classification specifications will incorporate duties not previously listed; reflect revised qualifications; establish distinguishing characteristics; add specific or clarify knowledge, skills, and abilities; and represent working conditions.

## V. Classification Analysis and Recommended Classification Structure

The classification structure recommended by CPS HR utilizes a mix of a broad and narrow classification system, with generalized and specialized job descriptions. The structure includes creation of new job classes, updated class titles, classification specification language updates and the elimination of a few classes. The proposed structure: (i) consolidates classifications where the duties and responsibilities of the work assigned are sufficiently similar in scope and complexity; (ii) creates new classifications where the duties and responsibilities are sufficiently unique in scope and complexity, (iii) provides clearer distinctions among the different classifications, and (iv) creates career ladders where deemed appropriate by staffing allocations and workload distribution.

### Title Protocol

CPS recommends the following title protocol in order to maintain consistency across the City:

Recommended Title Structure	Class Description
<b><i>Director / Chief</i></b>	The executive manager of a department, accountable for all resources and activities, strategic direction, budgetary oversight, long-and short-term service results and integration of multiple functional responsibilities within the department and with other departments to achieve optimal efficiency and effectiveness. *Chief allocations pertain to public safety roles.
<b><i>Assistant / Deputy Director</i></b>	The second-in-command manager of a department reporting to executive staff, and having the authority to act in the absence of the department head only when assigned to do so, accountable for all or most resources and activities, long-and short-term service results and integration of functional responsibilities within the department and with other departments to achieve optimal efficiency and effectiveness.

Recommended Title Structure	Class Description
<b>Manager</b>	A professional position responsible for planning, controlling, and integrating the activities of a division, major function, or defined unit within larger departments of the City and important, specifically assigned program teams. An incumbent may provide functional responsibility for full administrative supervision/management of team members.
<b>Supervisor</b>	This classification is defined as the supervisory level providing guidance, support, and direction to assigned staff within a defined work unit; responsible for team development; evaluating, mentoring, and training staff; and constantly prioritizing and monitoring work flow within assigned units.
<b>Principal Analyst</b> <i>(not recommended in proposed structure but may be useful in future classification work)</i>	This is the advanced professional career-level class. Incumbents in this class have expert-level responsibility working from broad policies and towards general objectives and referring specific matters to a superior only when interpretation or clarification of organizational policies is necessary. Responsible for managing, planning, directing, organizing, overseeing and coordinating program activities. Incumbents may supervise staff. This level is not used in the City likely due to the size of the agency and existing distribution of classifications based on scope of work.
<b>Senior Analyst</b>	Advanced journey level performing advanced, specialized work of professional nature, utilizing skills that require technical expertise and an understanding of complex analytical procedures and programs processes, including analysis of complex business processes and requirements and the ability to work with a significant amount of independent authority and judgment. Incumbents' primary responsibilities consist of providing expertise and guidance to other professional, administrative staff in complex program analysis and solutions; serving as a team lead; and/or management of large, complex projects, which includes the management of project team members and other resources; and performs other related duties as assigned. May provide functional and/or technical lead role over subordinate technical and/or professional staff.
<b>Analyst I/II</b>	Experienced journey-level professional providing analytical and technical assistance regarding programmatic or functional systems and procedures. Performs in-depth research on a variety of departmental inquiries. Writes, reviews and updates department or unit or function procedures. May assist management in preparing, recommending and administering the

Recommended Title Structure	Class Description
	department budget(s) including financial analysis, payment of invoices, monitoring and analyzing costs and expenditures and related activities; contract and RFP administration. Writes and updates reports. Requires considerable knowledge and experience within functional work area.
<b>Coordinator, Specialist and Administrative</b>	Roles supporting program and specialized functions. Allocation may result in development levels, I/II/III, based on assigned tasks and experience level.

## Recommended Classification Structure

The illustrations on the following pages represents functional work families, which may be assigned, based upon essential duties throughout the City. The classes illustrate a series progression and clarification of titling protocol.

**Recommended Classification Structure**

Organizational Chart 1 of 3

**City Manager**  
*City Manager reports to City Council*  
 City Manager (1)  
 Assistant City Manager (1-Vacant)  
 Assistant to Council/ PIO (1)  
 Management Analyst (1)  
*\*Administrative Coordinator (shared City Clerk)*

**ECONOMIC DEVELOPMENT**  
*Remain direct report of City Manager's Office*  
 Economic Development Manager (1)  
 Economic Development Assistant (1)  
 Office Assistant (1)

**City Attorney/ Prosecutor**  
 City Attorney(1)  
 Assistant City Attorney (1)  
 Legal Secretary (1)

**PROSECUTOR**  
 City Prosecutor(1)  
 Legal Secretary (1)

**Municipal Court**  
 Magistrate (1)  
 Court Administrator (1)  
 Bailiff (1)  
 Chief Court Clerk (1)  
 Court Clerk II (3)  
 Court Clerk I (1) + (1 Vacant)  
 Court Interpreter (1-New)

**City Clerk**  
*City Clerk reports to City Manager*  
 City Clerk (1)  
 Deputy City Clerk (1)  
*\*Administrative Coordinator (shared City Manager)*

City Manager

Director

Assistant Director

Manager

Supervisor

**Professional**  
 Subject Matter Expert – Principal  
 Advanced – Sr./Supervising  
 Journey - II  
 Entry - I

Coordinator

**Technical/Clerical**  
 Specialist  
 Advanced – Senior/Lead/III  
 Journey - II  
 Entry - I

**Skilled Trade**  
 Advanced – Lead/III  
 Journey - II  
 Entry - I

Trainee  
 Cadets/Intern

**Human Resources**  
*Director of HR reports to City Manager*  
 Director of Human Resources (1)  
 Senior HR Analyst (1)  
 HR Analyst (1-New)  
 HR Coordinator (2)  
 HR Technician (1)

**Finance**  
*Director of Finance reports to City Manager*  
 Director of Finance (1)  
 Assistant Director of Finance (1)  
 Accountant II (New)  
 Accountant I (3)  
 Purchasing Coordinator (1)  
 Contracts & Grants Coordinator (1)  
 Accounting Specialist (1)  
 Administrative Coordinator (1)

**RISK MANAGEMENT**  
 Risk Property Coordinator (1)

**BILLINGS & COLLECTIONS**  
*Absorb division formerly called "Utilities" into Finance from Public Works*  
 Billing & Collections Manager (1-Vacant)  
 Administrative Coordinator (1)  
 Meter Reader Technician (2)  
 Meter Reader (1)  
 Accounting Specialist (2)  
 Customer Service Representatives (2)  
 Office Assistant (1)  
 Business License Specialist (1-New)  
*Absorb class into Finance from Planning & Zoning*

**Information Technology**  
*IT Manager reports to City Manager*  
 IT Manager (1)  
 Senior IT Technician (1-New)  
 IT Technician (1)  
 Graphics & Media Specialist (1)

Rev. 8/2017

**Recommended Classification Structure**

Organizational Chart 2 of 3

**Police**  
Chief of Police reports to City Manager

- Chief of Police (1)
- Police Commander (1-Vacant)
- Police Lieutenant (2)
- Police Sergeant (4)
- Police Corporal (3) + (1 Vacant)
- Police Officer (27)
- Police Officer [Code Enforcement] (1)
- Transit Enforcement Officer (5)

**ADMINISTRATION**

- Police Administrator (1)
- Police Communications Supervisor (1)
- Police Communications Officer (10)
- Property & Evidence Tech (1)
- Administrative Coordinator (1)
- Administrative Assistant (1)
- Police Records Clerk (1)
- Animal Control Officer (2)

City Manager

Director

Assistant Director

Manager

Supervisor

**Professional**  
Subject Matter Expert – Principal  
Advanced – Sr./Supervising  
Journey - II  
Entry - I

Coordinator

**Technical/Clerical**  
Specialist  
Advanced – Senior/Lead/III  
Journey - II  
Entry - I

**Skilled Trade**  
Advanced – Lead/III  
Journey - II  
Entry - I

Trainee  
Cadets/Intern

**Fire**  
Fire Chief reports to City Manager

- Fire Chief (1)
- Asst. Fire Chief (1-Vacant)
- Fire Captain (6)
- Fire Engineer (5)
- Fire Fighter (25) Part-Time (10)
- Fire Inspector (1)
- Administrative Coordinator (1-New)
- Administrative Assistant (1)
- Office Assistant (1)

**Planning & Zoning**  
Director of Planning and Zoning reports to City Manager

- Director of Planning & Zoning (1)
- Associate Planner (1-New)
- Assistant Planner (1)
- Planning Technician (1)

**BUILDING SAFETY**

- Building Plans Examiner (1)
- Building Inspector II (1-New)
- Building Inspector I (1)
- Code Enforcement Officer (1)
- Office Assistant (1)
- GIS Specialist (1)
- Absorb class into Planning from IT

Post 8/1/17

**Recommended Classification Structure**

Organizational Chart 3 of 3

**Public Works**  
Director of Public Works reports to City Manager

**ADMINISTRATION**  
Director Public Works (1)  
Assistant Director of PW (1)  
Administrative Coordinator (1)  
Administrative Assistant (1)

**HIGHWAY USERS & SOLID WASTE**  
Public Works Supervisor (1)  
**Highway**  
Maintenance Supervisor (1)  
Maintenance Specialist (10)  
Heavy Equipment Operator (1)  
Equipment Operator (4)  
**Solid Waste**  
Heavy Equipment Operator (1)  
Equipment Operator (3)

**WASTEWATER**  
Wastewater Supervisor (1)  
Electrician (1) (shared with Water)  
Chief Operator (2)  
Wastewater Plant Operator (8)

**WATER**  
Water Systems Supervisor (1)  
Electrician (1) (shared with Wastewater)  
Chief Operator (1-New)  
Water Systems Operator (8)

**FLEET SERVICES**  
Absorb division into Public Works  
[Office Manager moved to FACILITY MAINTENANCE]  
Lead Mechanic (1)  
Mechanic (3)  
Office Assistant (1)

City Manager

Director

Assistant Director

Manager

Supervisor

**Professional**  
Subject Matter Expert – Principal  
Advanced – Sr./Supervising  
Journey - II  
Entry - I

Coordinator

**Technical/Clerical**  
Specialist  
Advanced – Senior/Lead/III  
Journey - II  
Entry - I

**Skilled Trade**  
Advanced – Lead/III  
Journey - II  
Entry - I

**Trainee**  
Cadets/Intern

**Parks & Recreation**  
Director of Parks and Recreation reports to City Manager

**ADMINISTRATION**  
Parks & Recreation Director (1)  
Assistant P&R Director (1-Vacant)  
Recreation Specialist (1)  
Administrative Assistant (1)  
Recreation Coordinator (2)

**AQUATIC CENTER**  
Recreation Specialist [Pool] (1)  
Head Life Guard (1)  
Life Guard (11)

**CULTURAL CENTER**  
Recreation Specialist (1-Vacant)  
Office Assistant (1-Vacant)

**YOUTH CENTER**  
Recreation Specialist (1)  
Recreation Intern (1)

**FACILITY MAINTENANCE**  
Absorb division into Parks & Recreation  
[Office Manager from FLEET SERVICES reclassified]  
Facilities Supervisor (1)  
Lead Custodian (1)  
Custodian (5)  
Building Maintenance Technician (1)

**PARKS GROUNDS**  
Parks Supervisor (1)  
Crew Leader Supervisor (1)  
Maintenance Specialist (5)  
Maintenance Technicians (5 + 1 PT)

**SENIOR SERVICES**  
Senior Services Manager (1)  
Senior Services Assistant/ Part-Time (1)  
Senior Services Assistant/Driver (1)  
Driver (1)  
Office Assistant (1-New)

## VI. Summary Conclusion and Next Steps

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A summary of study results based on the recommended structure are outlined below:

- 1. Number of Direct Reports to the City Administrator:** The proposed structure reduces the number of direct reports to the City Administrator (recommended title change to City Manager) from fourteen (14) department heads to eleven (11) departments with reassigned functional units that make more operational sense. The City Administrator will go from seventeen (17) direct reports in the existing structure to fourteen (14) direct reports, due to maintaining direct supervision over the one (1) Assistant to Council/Public Information Officer (PIO), one (1) Management Analyst, and one (1) Administrative Coordinator currently assigned to the City Administrator's Office. CPS HR recommends filling the vacant Assistant City Administrator role (and retitling to Assistant City Manager), and further reassigning departments and direct supervisors in the future in order to distribute City management and make oversight more manageable. The Director of Human Resources will assume the duties set forth in the personnel rules relating to grievances and discipline, and carry out the implementation of the proposed classification study results and reorganization.
- 2. Director Roles:** The issue of retitling came up in the study's kickoff meeting with all City leadership and in subsequent conversations with management, in particular, the change from Director to Manager. There was also concern about some other titling issues, such as specialist titles. CPS HR is an independent third party that assesses the position, and not the person, in order to remain objective in recommending neutral and consistent solutions. It will be important for all employees to understand that the study is of positions, not people. Furthermore, the director level across the City encompasses broader oversight often involving multiple functional areas/divisions and numerous direct reports in trade, administrative, clerical, and professional level positions. The director title should be reserved for positions operating in that capacity.
- 3. Title Consistency:** Recommended titling protocol will aide in supporting a consistent model that promotes succession planning and future class development. Staff will easily recognize positions in hierarchical series and classification order based on the designated title. Title consistency also helps to create bands to determine appropriate levels of minimum qualifications.

As an example, the Purchasing Agent III classification is recommended to be retitled to Purchasing Coordinator based on the level and scope of work performed. The Coordinator title will allow for title consistency with the Contracts and Grants Coordinator and Risk Property Coordinator roles in Finance. All three positions do not manage or supervise staff, but will work with a high degree of autonomy within their designated work assignment.

- 4. Elimination of Classes:** CPS HR recommends the elimination of four classifications: Secretary, Office Support Specialist, Office Manager, and Paramedic. The job tasks characterized within these classes were previously absorbed into other classifications in the existing structure or will result in reclassification to a new class in the proposed structure. CPS HR also recommends the elimination of Purchasing Agent I and Purchasing Agent II. The job tasks characterized within these classes are not assigned to current incumbents. Currently, the Purchasing Agent I/II classifications are not listed in the City's salary schedule and the series is not needed operationally within the Finance Department.

A total of 110 classification specifications and 235 PDQs were reviewed by CPS HR consultants. A small handful of the classifications did not have a current incumbent, hence CPS HR did not receive any PDQs for vacant positions. There was one classification in the City Administration Office, which CPS HR did not receive a PDQ. Management Analyst, Christine Hagen, did not complete a PDQ; therefore, no specifics of the classification are available. However, CPS HR finds that a broad analytical classification, capable of handling complex analytical assignments is common in public agencies and supports the concept of having such a classification or series in the City.

Additionally, CPS HR Consultants interviewed ninety-four (94) of the City's employees. For most classifications, the City's classification specifications appear to accurately reflect the job titles, job duties, required knowledge, skills, and abilities (KSAs), and minimum qualifications of the positions. All class specifications were updated using a template approved by the City, and expanded upon to include relevant information gathered during the agencywide classification study.

Important: CPS HR recommendations are included in a Master Allocation Tracking Spreadsheet (summarized in Appendix C) that corresponds with this written report. Each employee included in the study is listed individually with a classification recommendation.

This report provides detailed information concerning the scope of the project, the methodology used to complete the classification study, as well as the results of the study. Should you require any further information, or have questions and comments with respect to this report, please do not hesitate to contact the Project Manager, Jennifer Ramos, at (916) 471-3125 or [jramos@cpsshr.us](mailto:jramos@cpsshr.us).

## **Appendix A: Pre-populated Position Description Questionnaire (PDQ) Template – English & Spanish versions**

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City of San Luis and CPS HR Consulting

Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION

**Classification Title: Recreation Specialist**

The submission process for this questionnaire will involve multiple levels of review for quality control purposes. If you are a Supervisor or Department Head reviewing this PDQ, please see the instructions on the following page.

**Employee Instructions:**

The position description questionnaire (PDQ) is designed to obtain information about jobs within the organization for classification purposes only. This questionnaire will be used to evaluate the duties that constitute the **position**, not the performance or qualifications of the **employee**.

The goal of the PDQ is to capture a **current** and **accurate** picture of the work being performed within a specific position. The information collected will be used to update classifications as necessary and make recommendations to management.

**NOTE:** In an effort to save employees time, the questionnaire is **pre-populated** with the information on your **existing job description**. Please do not write over any of the pre-populated statements. If a pre-populated statement is not relevant to your position, select the appropriate check box.

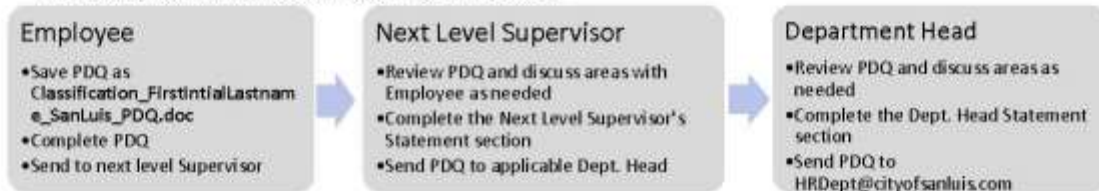
There are **optional** text boxes at the end of each section where you may write in new or additional tasks/functions, explain any changes or corrections that need to be made to existing duty statements, and/or provide comments that the review committee should consider when looking at your classification. Leave these sections blank if you do not have any changes or additions to the pre-populated boxes.

**You may use your existing job description for reference while completing the PDQ.**

Thank you for your help with this important step in the classification review process.

**Process**

The flowchart below outlines the PDQ completion process.



This PDQ is constructed so that you can complete it electronically and send it to your next level supervisor for review by e-mail. Completing the PDQ electronically is the preferred method. A paper version of the PDQ will be allowed for those with limited or no computer access.

**If completing electronically, please rename and save this document to one of your file folder on your computer before beginning.**

1. Click on File, Save As.
2. Save the document in a file folder that you are familiar with and will be able to find again.
3. Save this document using your name in the following naming convention;

**Classification\_ FstInitialLastName\_SanLuis\_PDQ.doc**  
**Example: Accountant\_JSmith\_SanLuis\_PDQ.doc**

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*Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION*

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4. You may reference your current job description while completing the PDQ.
5. You may also attach additional information or pages if needed. This includes any previous PDQs or job related documents. If necessary, these can be sent as separate documents. Please use the naming convention of **Classification\_FirstInitialLastName\_SanLuis\_PDQ Supporting Doc**

If you have co-workers in the same classification who perform duties identical to yours, you may work together to complete a group PDQ. If you do so, please include all employee names on the PDQ for recordkeeping purposes.

**After the PDQ is completed, please email the questionnaire to your next level supervisor.**

**Next Level Supervisor Instructions:**

Please review the PDQ after it is completed by the employee and answer the questions on the Next Level Supervisor Statement page at the end of the document. It is important that you **do not change** any of the information submitted by the employee. If you have additional comments or concerns, please provide them in the supervisor section. Once the review is finished, please send the document to the applicable department head.

If you are a supervisor completing this PDQ for a vacant position, save this document using the following naming convention: **Classification\_SanLuis\_PDQ.doc**. If you have more than one vacant position, make sure that each PDQ is named differently.

**Department Head Instructions:**

Please review the PDQ once it is completed by the employee and reviewed by their direct supervisor and answer the questions on the Department Head Statement page at the end of the document. It is important that you **do not change** any of the information submitted by the employee or any of the responses made by the supervisor in the supervisory review section. If you have additional comments or concerns, please provide them in the department head statement as needed.

Once your review is finished, please send the document to the San Luis HR Department: [HRDept@cityofsanluis.org](mailto:HRDept@cityofsanluis.org).

Thank you for your participation. If you have any questions, please contact:

San Luis HR	<a href="mailto:HRDept@cityofsanluis.org">HRDept@cityofsanluis.org</a>	(928) 341-8547
Sarah Williams	<a href="mailto:swilliams@cpshr.us">swilliams@cpshr.us</a>	(916) 471-3117

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*Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION*

**EMPLOYEE INFORMATION**

<b>Name</b>	<b>Work Phone Number:</b>
<input type="text"/>	<input type="text"/>
<b>Work Location:</b>	<b>Work E-mail Address:</b>
<input type="text"/>	<input type="text"/>
<b>Current Classification Title:</b>	<b>Length of Time in Current Position:</b>
<input type="text"/>	<input type="text"/>
<b>Supervisor's Name:</b>	<b>Supervisor's Classification Title:</b>
<input type="text"/>	<input type="text"/>

**1. JOB SUMMARY**

Does the definition below accurately describe the general responsibilities and work performed by this classification?

**YES**     **NO**

Under general supervision, provides support to various recreational services and activities sponsored by the City of San Luis and performs grounds and pool maintenance.

If **No**, please add any additional relevant information that needs to be included and/or edit the statement as needed in the area below.

City of San Luis and CPS HR Consulting

Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION

**2. ESSENTIAL FUNCTIONS**

After reading each of the essential functions on the following page, rate each statement on the following:

- **Performed by Classification:** Does this statement accurately describe an essential function performed by this classification?
- **Frequency:** How frequently do you perform this task? Regardless of the importance of the task indicate how often you perform it.
  - **0 = Never.** I do not perform this task in my job.
  - **1 = Infrequently.** I perform this task no more than once a month.
  - **2 = Somewhat frequently.** I perform this task no more than once a week.
  - **3 = Frequently.** I perform this task several times a week, but no more than once a day.
  - **4 = Very frequently.** I perform this task several times each day.
- **Importance:** How important is this task for successfully performing your job? Regardless of the frequency or amount of time spent on this task, indicate the task's importance.
  - **0 = Not important.** This task is not important to my job. Failure to successfully perform this task typically has no consequence.
  - **1 = Minor importance.** This task is of minor importance to my job. Failure to successfully perform this task has little or no consequence.
  - **2 = Important.** This task is important to my job. Failure to successfully perform this task has some negative consequences.
  - **3 = Critical.** This task is one of the most essential tasks of my job. Failure to successfully perform this task has significant negative consequences.
- **Needed at Entry:** Is it necessary to know how to perform this task upon entry into this job?
  - **No** = Success in this job does not require proficiency in this task prior to entry. Job demands allow a newly hired person to acquire task proficiency through training or experience on the job.
  - **Yes** = Success in this job requires experience performing this task prior to entry. Job demands require task proficiency soon after hire (for example, in the first week or so) and there is no opportunity to learn to perform this task through training or experience on the job.
- **% of Time Spent on Task:** Provide the approximate percent of time spent on each essential function. The total of all percentages should equal 100%. If the total percent of time spent on tasks totals more than 100% due to overlap in duties, please explain in the text box below.

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Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION

#	Essential Function	Performed by Classification?	Frequency	Importance	Needed at Entry	% of time Spent on Task
1	Assists with, coordinates, and/or oversees recreational activities at the City Gymnasium;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	
2	Leads, and participates in, recreational activities;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	
3	Coordinates training sessions and participates in special recreational events;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	
4	Maintains discipline and safety/sanitary standards;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	
5	Maintains records of gym usage, scheduled activities and events, vehicle usage, and office supplies and reports information to Supervisor;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	

City of San Luis and CPS HR Consulting

Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION

#	Essential Function	Performed by Classification?	Frequency	Importance	Needed at Entry	% of time Spent on Task
6	Interprets and explains game rules, organizes sports teams, and/or officiates at recreational games and events;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	
7	Receives, unpacks, stores, and transports recreational materials, supplies, and equipment;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	
8	Coaches sports teams at practice sessions as required;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	
9	Performs basic cleaning and maintenance of the gym facility and surrounding grounds;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	
10	Prepares (lines and rakes) baseball fields;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	

City of San Luis and CPS HR Consulting

Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION

#	Essential Function	Performed by Classification?	Frequency	Importance	Needed at Entry	% of time Spent on Task
11	Assists in grounds/park cleaning and maintenance as required or assigned;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	
12	May record information about games such as player names, scores, forfeits, violations, protests, league standings, schedules, etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	
13		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	
14		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	
15		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Never <input type="checkbox"/> infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	

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*Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION*

Are there any additional essential functions performed by this classification that are not covered by the statements above? Please list them in the area below.

City of San Luis and CPS HR Consulting

Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION

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### 3. KNOWLEDGE/SKILLS/ABILITIES

After reading each of the Knowledge, Skill, and Ability (KSA) statements on the following pages, rate each statement on the following:

- **Relevant to the Classification:** Does the statement accurately describe the knowledge/ability/skill (KSA) needed to perform the essential functions of this classification?
- **Importance:** How important is this KSA for successfully performing your job?
  - **0 = Not important.** This KSA is not important to successful performance.
  - **1 = Minor importance.** This KSA is of minor importance to successful job performance.
  - **2 = Important.** This KSA is important for successful performance.
  - **3 = Critical.** This KSA is essential to the job and is critically important to successful performance.
- **Needed at Entry:** Is this KSA needed upon entry into this job? In other words, must an individual be competent in a particular area before entering the job, or is an individual expected to gain competence through training or experience on the job.
  - **No** = Successful job performance does not require proficiency in this KSA prior to entry. Competence in this area must be developed over time through training or experience on the job.
  - **Yes** = Successful job performance requires this KSA prior to entry. Competence in this area is difficult to acquire, and job demands require this KSA soon after hire (for example, in the first week or so).
- **Distinguishing Value:** Beyond a minimally required level, do employees who have greater competence in this KSA perform more effectively than employees who are less competent in this KSA?
  - **No** = Success in this job does not require proficiency in this task prior to entry. Job demands allow a newly hired person to acquire task proficiency through training or experience on the job.
  - **Yes** = Success in this job requires experience performing this task prior to entry. Job demands require task proficiency soon after hire (for example, in the first week or so) and there is no opportunity to learn to perform this task through training or experience on the job.

City of San Luis and CPS HR Consulting

Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION

Knowledge					
#	Statement	Relevant to Classification?	Importance	Needed at Entry	Distinguishing Value
1	principles, rules, materials, equipment, and organization of recreational activities;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
2	rules and regulations applicable to sporting events;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
3	safety and sanitary practices and procedures and related standards and regulations;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
4	grounds and building maintenance.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
5		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
6		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
8		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
9		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
10		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

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*Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION*

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Are there any additional knowledge statements that need to be added? Please list them in the area below.

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Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION

Ability				
Statement	Relevant to Classification?	Importance	Needed at Entry	Distinguishing Value
1	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
2	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
3	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
4	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
5	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
6	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
8	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
9	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
10	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not imp. <input type="checkbox"/> Minor imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

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Are there any additional **ability** statements that need to be added? Please list them in the area below.

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Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION

Skill					
	Statement	Relevant to Classification?	Importance	Needed at Entry	Distinguishing Value
1	establishing and maintaining effective working relationships with others and interacting with the public;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
2	maintaining discipline and handling emergency situations;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
3	implementing rules and regulating the conduct of activity participants;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
4	preparing and maintaining activity records;	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
5	stimulating interest and enthusiasm among others.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
6		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
8		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

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Are there any additional skill statements that need to be added? Please list them in the area below.

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**4. SUPERVISION/DIRECTION GIVEN**

Does the position directly supervise employees?

YES       NO

Indicate the total number of employees supervised directly:

and indirectly:

Does position perform "Lead" duties?

(Lead duties generally include training and providing ongoing guidance to staff; assigning and monitoring work; and assisting in providing information to the supervisor in areas such as employee selection, performance evaluations, and coverage schedules. Lead workers are typically not responsible for hiring/firing, corrective action, or preparing performance evaluations though they provide input for the evaluations.)

YES       NO

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List the employees directly supervised or lead (include name, classification, and status). If position supervises or leads more than ten employees, list only the job titles and number of people supervised:

- STATUS      **FTE = Full-time employee**  
                  **PT = Part-time Career or Part-time contract employee (seasonal/intermittent)**  
                  **TEMP = Temporary or Contract employee**

Name	Job Title	FTE	PT/TEMP
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

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**What type of supervision/lead is provided?** Please select all of the supervisory/lead duties performed, the level of authority, and indicate whether the activity is performed for employees, non-employees (e.g. contractors), or both.

Duty	No Authority	Recommend	With Prior Approval	On Own Authority	Employee or Non-Employee
Train others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Hire employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Plan and/or schedule work for others on specific projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Plan and/or schedule work for others on a daily basis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assign or delegate work to others on specific projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assign or delegate work to others on a daily basis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Monitor work of others on specific projects or on a daily basis (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Establish rules, procedures, and/or standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Approve overtime and/or leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Evaluate performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Take corrective action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Resolve complaints and/or grievances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

**City of San Luis and CPS HR Consulting**

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**5. QUALIFICATIONS:**

**Education and/or Experience**

Does the statement below accurately describe the minimum education/experience requirements for entry into this classification?

YES     NO

Education and/or experience equivalent to one (1) year full-time work coaching, coordinating, or officiating organized recreational activities/sports. Depending upon the needs of the City, some incumbents of the class may be required to demonstrate fluency in both Spanish and English as a condition of employment.

If **No**, please add any additional relevant information that needs to be included or edit the statement as needed in the area below.

**City of San Luis and CPS HR Consulting**

*Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION*

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**EMPLOYEE'S STATEMENT**

If there are other aspects of your job not covered in this questionnaire that are important in understanding your job content, please describe below.

**Important Note:** You may also attach additional information or pages if needed. This includes any previous PDQs or job related documents.

By checking this box, I certify that I am the individual named below who has completed this questionnaire.

**Printed Name:**

**Classification Title:**

**Signature:**

**Date:**

**You have completed the employee section of the Classification Questionnaire.**

**Please send to your immediate supervisor for review.**

*Thank you for your participation!*

City of San Luis and CPS HR Consulting

Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION

**NEXT LEVEL SUPERVISOR'S STATEMENT**

After reviewing this employee's questionnaire carefully to see that it is accurate and complete, fill out Items 1-8 below.

Do not fill in these items unless you supervise the employee directly. Your certification below means that you accept responsibility for the accuracy and completeness with which the entire questionnaire describes the duties and responsibility of the job.

If the Employee's Statement does not express your view of the duties, responsibilities and essential functions that you have assigned the employee, please clarify or elaborate below. **Please allow your employees to review your responses if they request to see them.**

There are two essential cautions you should observe:

- **Under no circumstances** should the employee's entries in the Employee's Statement section be altered.
- Do not make any statements or comments about the employee's work performance, competence, or qualifications. This questionnaire will be used to evaluate the duties that constitute the **position**, not the performance or qualifications of the **employee**.

1. Does the **job summary/definition** of the classification (including any edits provided by the employee) accurately reflect the general responsibilities and work performed by this classification? If not, please clarify.

2. Do you agree with the **essential tasks** and the ratings provided by the employee? If not, please clarify.

3. Do you agree with the **knowledge/skill/ability (KSAs)** statements and the rating provided by the employee? If not, please clarify.

4. Do you agree with the **working condition** statement? If not, please clarify.

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5. Do you agree with **education/experience** statement? If not, please clarify.

6. Do you agree with **licenses/certification** statement? If not, please clarify.

7. What additional information should be considered in evaluating the appropriate classification for this position?

8. Is reorganization or other changes planned or taking place in your organization that will impact the content or level of this job?

By checking this box, I certify that I supervise the employee who has completed this questionnaire.

**Printed Name:**

**Classification Title:**

**Signature:**

**Date:**

**City of San Luis and CPS HR Consulting**

*Position Description Questionnaire for Classifications to be Completed by Employee – ENGLISH VERSION*

**DEPARTMENT HEAD STATEMENT**

After reviewing this employee's questionnaire carefully to see that it is accurate and complete, complete the items below.

Do not fill in these items unless you are the applicable Department Head. Your certification below means that you accept responsibility for the accuracy and completeness with which the entire questionnaire describes the duties and responsibility of the job.

If the Employee's Statement does not express your view of the duties, responsibilities and essential functions that you have assigned the employee, please clarify or elaborate below. **Please allow your employees to review your responses if they request to see them.**

There are two essential cautions you should observe:

- **Under no circumstances** should the employee's entries in the Employee's Statement section be altered.
- Do not make any statements or comments about the employee's work performance, competence, or qualifications. This questionnaire will be used to evaluate the duties that constitute the **position**, not the performance or qualifications of the **employee**.

After you have reviewed this questionnaire and completed this page, please save this document and send to HRDept@cityofsanluis.org.

Do you agree with the other information given by the employee and/or immediate supervisor?

YES       NO

If not, please clarify:

Printed Name:

Signature:

Classification Title:

Date:

Ciudad de San Luis y CPS HR Consulting

Cuestionario de descripción de posición para clasificaciones - Debe de ser completado por el empleado

**Título de la Clasificación: Recreation Specialist**

El proceso de envío de este cuestionario implicara multiples niveles de revisión para fines de control de calidad. Si usted es un supervisor o jefe de departamento revisando este CDP, por favor consulte las instrucciones en la página siguiente.

**Instrucciones de Empleado:**

El cuestionario de descripción de posición está diseñado para obtener información sobre los puestos de trabajo dentro de la organización sólo con fines de clasificación. Este cuestionario se utilizará para evaluar las funciones que constituyen la **posición**, no el rendimiento ni calificaciones del **empleado**.

El objetivo del CDP es captar una imagen **corriente** y **precisa** de la obra que se realiza dentro de una posición específica. La información recogida se utilizará para actualizar las clasificaciones según sea necesario y hacer recomendaciones a la gerencia.

NOTA: En un esfuerzo para ahorrar el tiempo de los empleados, el cuestionario fue **pre-poblado** previamente con la información en su descripción de trabajo actual. Por favor, no escriba sobre cualquiera de los estados pre-poblados. Si una declaración no es relevante a su posición, seleccione la casilla de verificación correspondiente.

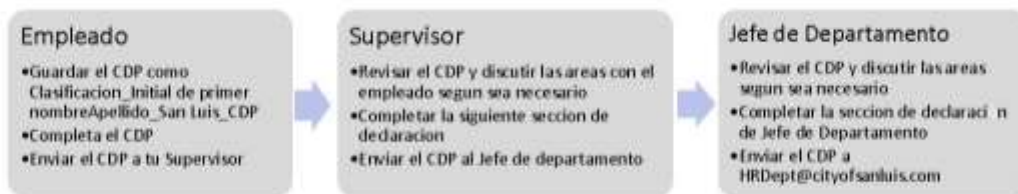
Hay cuadros de texto **opcional** al fin de cada sección donde se puede escribir nuevas o adicionales tareas/funciones y explicar los cambios o correcciones que deben hacerse a las declaraciones de tareas existentes y/o proporcionar comentarios que el comité de revisión debe tener en cuenta cuando estan mirando su clasificación. Deje estas secciones en blanco si no tiene todos los cambios ni adiciones a las casillas ya pobladas.

**Usted puede utilizar su descripción de trabajo existente como referencia para completar este CDP.**

Gracias por su ayuda con este importante paso en el proceso de revisión de la clasificación.

**Proceso**

La imagen a continuación describe el proceso de terminación de CDP.



Este CDP es construido de modo que usted puede completar electrónicamente y enviar a su supervisor para su revisión por correo electrónico. Finalización del CDP electrónicamente es el metodo preferido. La version en papel del CDP sera permitida para los que no tienen acceso a una computadora.

**Si esta completando este formulario electronicamente, por favor cambie el nombre y guarde este documento en una de sus carpetas de archivos antes de comenzar.**

1. Haga clic en archivo, guardar como.
2. Guardar el documento en una carpeta de archivo que usted conoce y será capaz de encontrar otra vez.

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*Cuestionario de descripción de posición para clasificaciones - Debe de ser completado por el empleado*

3. Por favor, guarde este documento con su nombre en la siguiente convención de nomenclatura:  
**Clasificación\_Inicialdeprimernombreapellido\_SanLuis\_CDP.doc**  
**Ejemplo: Contador\_JSmith\_SanLuis\_CDP.doc**
4. Usted puede hacer referencia a la descripción de su trabajo actual especificación de mientras termina el CDP.
5. Usted también puede adjuntar información adicional o páginas si es necesario. Esto incluye cualquier CDPs o documentos relacionados con empleo. Si es necesario, estos pueden ser enviados como documentos separados. Por favor use la siguiente convención nomenclatura de  
**Clasificación\_InicialdeprimernombreApellido\_San Luis\_CDP Documentos de respaldo**

Si tienes compañeros de trabajo en la misma clasificación que realizan funciones idénticas a la suya, usted puede trabajar junto para completar el CDP en grupo. Si lo hace, por favor incluya todos los nombres de empleados en el CDP para fines de mantenimiento de registros.

**Después que el CDP este completado, por favor mande el cuestionario por correo electrónico a su supervisor inmediato.**

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*Cuestionario de descripción de posición para clasificaciones - Debe de ser completado por el empleado*

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**Instrucciones para el Supervisor:**

Revise el CDP finalizado por parte del empleado y responda a las preguntas en la página de revisión supervisora en el final del documento. Es importante que **no cambie** ninguna de la información presentada por el empleado. Si tiene otros comentarios o dudas, por favor de darlas en la sección de supervisor según sea necesario. Cuando complete su revisión, por favor de mandar el documento al Jefe del Departamento.

Si usted es un supervisor completando este CDP para una posición **vacante**, por favor guarde este documento utilizando la siguiente convención de nomenclatura: **Nombre de la clasificación\_SanLuis\_CDPForm.doc**. Si usted tiene más de un puesto vacante, por favor **asegúrese** de que cada CDP es nombrado diferentemente.

**Instrucciones para El Jefe del Departamento:**

Por favor revise el CDP, una vez que sea completado por el empleado y revisado por su supervisor inmediato. Conteste las preguntas de la página de declaración del Jefe del Departamento al final del documento. Es importante que no cambien ninguna de la información presentada por el empleado ni las respuestas hechas por el supervisor en la sección de supervisores. Si tiene otros comentario o dudas, por favor de darlas en la sección del Jefe de Departamento según sea necesario.

Cuando acave de revisar el CDP, por favor mande este documento al departamento de San Luis HR: HRDept@cityofsanluis.org.

Gracias por su participación. Si usted tiene alguna pregunta, por favor póngase en contacto con:

San Luis HR	<a href="mailto:HRDept@cityofsanluis.org">HRDept@cityofsanluis.org</a>	(928) 341-8547
Sarah Williams	<a href="mailto:swilliams@cpshr.us">swilliams@cpshr.us</a>	(916) 471-3117

**Ciudad de San Luis y CPS HR Consulting**

*Cuestionario de descripción de posición para clasificaciones - Debe de ser completada por el empleado*

**INFORMACION DE EMPLEADO**

El Nombre:	Número de teléfono de trabajo:
<input type="text"/>	<input type="text"/>
Lugar de trabajo:	Dirección de correo electrónico de trabajo:
<input type="text"/>	<input type="text"/>
Título de clasificación actual:	Duración de tiempo en la posición actual:
<input type="text"/>	<input type="text"/>
Nombre del Supervisor:	Título de clasificación de Supervisor:
<input type="text"/>	<input type="text"/>

**1. RESUMEN DEL PUESTO**

La definición a continuación describe con precisión las responsabilidades generales y trabajo realizado por esta clasificación?

SI     NO

Under general supervision, provides support to various recreational services and activities sponsored by the City of San Luis and performs grounds and pool maintenance.

Si **No**, por favor agregue cualquier información adicional pertinente que debe estar incluido o editar la declaración declaración según sea necesario en la zona de abajo.

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*Cuestionario de descripción de posición para clasificaciones - Debe de ser completada por el empleado*

**2. FUNCIONES ESENCIALES**

Después de leer cada una de las funciones esenciales en la página siguiente, tarifa cada declaración en los siguientes:

- **Realizado por clasificación:** Esta declaración describe con precisión una función esencial realizada por esta clasificación?
- **Frecuencia:** Con que frecuencia usted realiza esta tarea? Independientemente de la importancia de la tarea debe indicar con que frecuencia se realiza.
  - **0 = Nunca.** Yo no realizo esta tarea en mi trabajo.
  - **1 = Con poca frecuencia.** Yo realizo esta tarea por lo menos una vez al mes.
  - **2 = Algo con frecuencia.** Yo realizo esta tarea no más de una vez por semana.
  - **3 = Con frecuencia.** Yo realizo esta tarea varias veces por semana, pero no más de una vez al día.
  - **4 = Con mucha frecuencia.** Yo realizo esta tarea varias veces cada día.
- **Importancia:** Es importante esta tarea para realizar con éxito su trabajo? Independientemente de la frecuencia o cantidad de tiempo dedicado a esta tarea, indican la importancia de la tarea.
  - **0 = No es importante.** Esta tarea no es importante para mi trabajo. Falla de realizar con éxito esta tarea normalmente tiene ninguna consecuencia.
  - **1 = Menor importancia.** Esta tarea es de menor importancia para mi trabajo. Falla de realizar con éxito esta tarea tiene poca o ninguna consecuencia.
  - **2 = Importante.** Esta tarea es importante para mi trabajo. Falla de realizar con éxito esta tarea tiene algunas consecuencias negativas.
  - **3 = Crítico.** Esta tarea es una de las tareas más esenciales de mi trabajo. Falla de realizar con éxito esta tarea tiene importantes consecuencias negativas.
- **Necesario en tiempo de entrada:** Es necesario saber como realizar esta tarea al entrar en este trabajo?
  - **No =** Éxito en este trabajo no requiere conocimiento en esta tarea antes de la entrada. Demandas de trabajo permite que una persona recién contratada adquirir dominio de la tarea a través de capacitación o experiencia en el trabajo.
  - **Si =** El éxito en este trabajo requiere experiencia en la realización de esta tarea antes de la entrada. Demandas del trabajo requieren dominio de la tarea pronto después de alquiler (por ejemplo, en la primera semana) y no hay ninguna oportunidad para aprender a realizar esta tarea a través de formación ni experiencia en el trabajo.
- **% de tiempo dedicado a tareas:** Proporcionar el porcentaje aproximado de tiempo dedicado a cada función esencial. El total de los porcentajes debe ser igual a 100%. Si el porcentaje de tiempo gastado en todos los resultados de las tareas es más del 100% debido a la superposición de función, por favor explique en el cuadro de texto abajo.

**Ciudad de San Luis y CPS HR Consulting**

*Cuestionario de descripción de posición para clasificaciones - Debe de ser completada por el empleado*

#	Función Esencial	Realizado por clasificación?	Frecuencia	Importancia	Necesario en tiempo de entrada	% de tiempo dedicado a tareas
1	Assists with, coordinates, and/or oversees recreational activities at the City Gymnasium;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	
2	Leads, and participates in, recreational activities;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	
3	Coordinates training sessions and participates in special recreational events;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	
4	Maintains discipline and safety/sanitary standards;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	
5	Maintains records of gym usage, scheduled activities and events, vehicle usage, and office supplies and reports information to Supervisor;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	

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#	Función Esencial	Realizado por clasificación?	Frecuencia	Importancia	Necesario en tiempo de entrada	% de tiempo dedicado a tareas
6	Interprets and explains game rules, organizes sports teams, and/or officiates at recreational games and events;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	
7	Receives, unpacks, stores, and transports recreational materials, supplies, and equipment;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	
8	Coaches sports teams at practice sessions as required;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	
9	Performs basic cleaning and maintenance of the gym facility and surrounding grounds;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	
10	Prepares (lines and rakes) baseball fields;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	

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#	Función Esencial	Realizado por clasificación?	Frecuencia	Importancia	Necesario en tiempo de entrada	% de tiempo dedicado a tareas
11	Assists in grounds/park cleaning and maintenance as required or assigned;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	
12	May record information about games such as player names, scores, forfeits, violations, protests, league standings, schedules, etc.	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	
13		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	
14		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	
15		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Nunca <input type="checkbox"/> Con Poca Frecuencia <input type="checkbox"/> Algo Con Frecuencia <input type="checkbox"/> Con Frecuencia <input type="checkbox"/> Con Mucha Frecuencia	<input type="checkbox"/> No Es Importante <input type="checkbox"/> Menor Importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	

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Hay adicionales funciones esenciales realizadas por esta clasificación que no cubrieron las declaraciones anteriores? Por favor enumérelas en la zona de abajo.

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**3. CONOCIMIENTO/HABILIDAD/CAPACIDAD**

Después de leer cada una de las afirmaciones de conocimiento, habilidad y capacidad (CHC) en las páginas siguientes, califique cada declaración con los siguientes:

- **Correspondientes a la clasificación:** La declaración describe con precisión el conocimiento/habilidad/capacidad (CHC) que se necesita para realizar las funciones esenciales de esta clasificación?
- **Importancia:** Que importante es este CHC para realizar con éxito su trabajo?
  - **0 = No es importante.** Este CHC no es importante para el desempeño exitoso.
  - **1 = Menor importancia.** Este CHC es de menor importancia al desempeño laboral exitoso.
  - **2 = Importante.** Este CHC es importante para el desempeño exitoso.
  - **3 = Crítico.** Este CHC es esencial para el trabajo y es de vital importancia para el desempeño exitoso.
- **Necesario en tiempo de entrada:** Es necesario al entrar en este trabajo este CHC? En otras palabras, un individuo debe ser competente en un área determinada antes de entrar en el trabajo, o un individuo debe obtener a través de formación o experiencia en el trabajo.
  - **No =** Desempeño laboral exitoso no requiere competencia en este CHC antes de la entrada. Competencia en esta área debe ser desarrollada con el tiempo a través de formación o experiencia.
  - **Si =** Desempeño laboral exitoso requiere este CHC antes de la entrada. Competencia en esta área es difícil de adquirir y demandas de trabajo requieren este CHC pronto después de alquiler (por ejemplo, en la primera semana).
- **Valor diferenciador:** Más allá de un nivel mínimo requerido los empleados que tienen mayor competencia en este CHC funcionan más eficazmente que los empleados menos competentes en esta CHC?
  - **No =** El éxito en este trabajo no requiere de conocimientos en esta tarea antes de la entrada. Demandas de trabajo permita que una persona recién contratada adquirir dominio de la tarea a través de capacitación o experiencia en el trabajo.
  - **Si =** El éxito en este trabajo requiere experiencia en la realización de esta tarea antes de la entrada. Demandas de trabajo requieren competencia de tarea poco después de alquiler (por ejemplo, en la primera semana más o menos) y no hay ninguna oportunidad para aprender a realizar esta tarea a través de capacitación ni experiencia en el trabajo.

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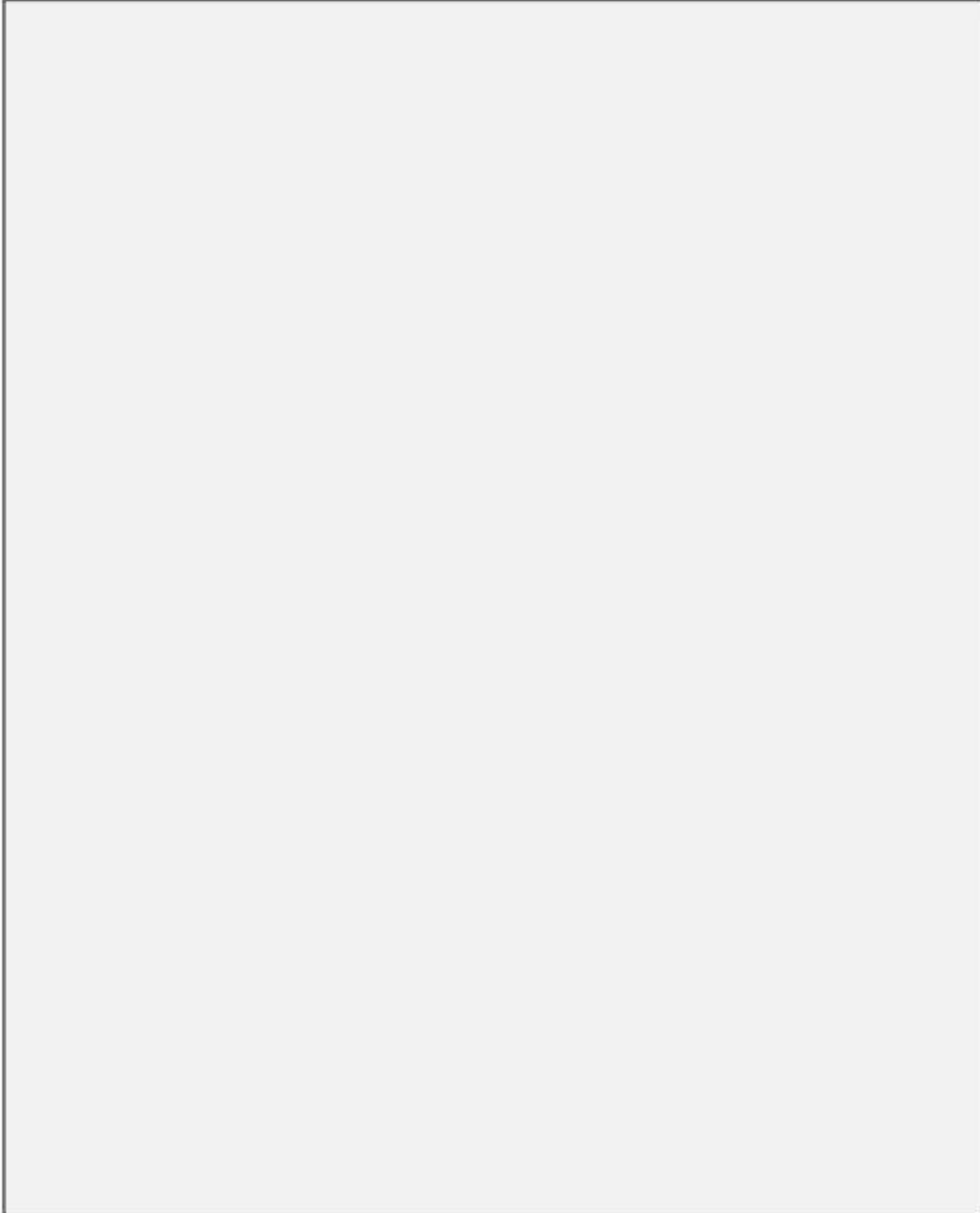
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<b>Conocimiento</b>					
<b>#</b>	<b>Declaración</b>	<b>Pertinent e a la clasifica- ción?</b>	<b>Importancia</b>	<b>Necesario en tiempo de entrada</b>	<b>Valor Diferenci- ador</b>
1	principles, rules, materials, equipment, and organization of recreational activities;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Critico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
2	rules and regulations applicable to sporting events;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Critico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
3	safety and sanitary practices and procedures and related standards and regulations;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Critico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
4	grounds and building maintenance.	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Critico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
5		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Critico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
6		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Critico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
7		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Critico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No

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Hay declaraciones de conocimiento adicional que hay que agregar? Por favor enumérelas en la zona de abajo.



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<b>Capacidad</b>					
#	Declaración	Pertinent e a la clasifica- ción?	Importancia	Necesario en tiempo de entrada	Valor Diferenci- ador
1		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
2		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
3		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
4		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
5		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
6		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
7		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
8		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
9		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
10		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No

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Hay declaraciones de capacidad adicional que hay que agregar? Por favor enumérelas en la zona de abajo.

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<b>Habilidad</b>					
<b>#</b>	<b>Declaración</b>	<b>Pertinente a la clasificación?</b>	<b>Importancia</b>	<b>Necesario en tiempo de entrada</b>	<b>Valor Diferenciador</b>
1	establishing and maintaining effective working relationships with others and interacting with the public;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
2	maintaining discipline and handling emergency situations;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
3	implementing rules and regulating the conduct of activity participants;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
4	preparing and maintaining activity records;	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
5	stimulating interest and enthusiasm among others.	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
6		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
7		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No
8		<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> No Es importante <input type="checkbox"/> Menor importancia <input type="checkbox"/> Importante <input type="checkbox"/> Crítico	<input type="checkbox"/> Si <input type="checkbox"/> No	<input type="checkbox"/> Si <input type="checkbox"/> No

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Hay declaraciones de **habilidad** adicional que hay que agregar? Por favor enumérelas en la zona de abajo.

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**4. SUPERVISION/DIRECCION DADA**

La posición directamente supervisa a empleados?

SI                       NO

Indicar el número total de empleados supervisados directamente:

y indirectamente:

Posición realiza funciones de líder?

(Funciones de trabajador en posición de líder generalmente incluyen capacitación y proveer orientación continué al personal; asignación y seguimiento de trabajos; y en proporcionar información al supervisor en áreas tales como selección de empleados, evaluaciones y horarios extras. Los trabajadores en posición de líder típicamente no son responsables por acción ni disparo de contratación, correctiva, ni la preparación de evaluaciones de desempeño proporcionan entrada para las evaluaciones.

SI                       NO

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Haga una lista de los empleados supervisados directamente (Incluir nombre, clasificación y estado). Si supervisa o lleva a más de diez empleados, liste solo los títulos de trabajo y el número de personas supervisadas:

- ESTADO      ETC= Empleado de tiempo completo  
 TP = Empleado de carrera a tiempo parcial o a tiempo parcial contrato (temporada/intermitente)  
 TEMP = Empleado temporal o contrato

Nombre	Título del Trabajo	ETC	TP/TEMP
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

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**Que tipo de supervisión/posición de lider es proporcionada?** Por favor seleccione todas las tareas de supervisión/posición de lider realizadas el nivel de autoridad e indicar si se realiza la actividad de los empleados, no empleados (por ejemplo, contratistas) o ambos.

Deber	Ninguna autoridad	Recomendar	Con la aprobación previa	Propia autoridad	Empleados o no empleados
Entrenar a otros	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Contratar empleados	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Planear o programar trabajo para los demas <b>en proyectos específicos.</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Planear o programar trabajo para otros sobre una base diaria.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Dar o delegar trabajo a otros <b>en proyectos específicos.</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Dar o delegar trabajo a otros sobre <b>una base diaria.</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Supervisar el trabajo de otros en proyectos específicos o sobre una base diaria (por favor explique)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Establecer reglas, procedimientos o normas.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Aprobar horas extras o permiso de ausencia.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Evaluar el desempeño	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Tomar medidas correctivas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Resolver las quejas o reclamaciones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Otros	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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**5. CALIFICACIONES:**

**Educación o Experiencia**

La siguiente declaración describe con precisión los requisitos mínimos de educación o experiencia para entrar en esta clasificación?

SI     NO

Education and/or experience equivalent to one (1) year full-time work coaching, coordinating, or officiating organized recreational activities/sports. Depending upon the needs of the City, some incumbents of the class may be required to demonstrate fluency in both Spanish and English as a condition of employment.

Si **No**, por favor agregue cualquier información adicional pertinente que deba estar incluido o editar la instrucción en las áreas a continuación.

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**DECLARACIÓN DEL EMPLEADO**

Si hay otros aspectos de su trabajo que no se incluyeron en este cuestionario que son importantes para comprender el contenido del trabajo, por favor describa abajo.

**Nota Importante:** Puede usted también adjuntar información adicional o páginas si es necesario. Esto incluye cualquier CDPs anteriores o documentos relacionados con empleo.

Al marcar esta casilla, certifico que soy la persona nombrada abajo que ha completado este cuestionario.

**Nombre:**

**Título de clasificación:**

**Firma:**

**Fecha:**

**Has completado la sección de empleado del Cuestionario de Clasificación.**

**Por favor, envíe a su supervisor inmediato para su revisión.**

*Gracias por su participación!*

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*Cuestionario de descripción de posición para clasificaciones - Debe de ser completada por el empleado*

**INSTRUCCION DEL SUPERVISOR INMEDIATO**

Después de revisar el cuestionario de este empleado cuidadosamente para ver que este exacta y completa, complete artículos 1-8 por debajo.

No llene en estos artículos, a menos que usted supervise al empleado directamente. Su certificación más abajo significa que usted acepta responsabilidad por la exactitud y la exhaustividad con la que el cuestionario entero describe los deberes y responsabilidades del trabajo.

Si la declaración del empleado no expresa su visión de los deberes, responsabilidades y funciones esenciales que ha asignado al empleado, por favor aclarar o elaborar a continuación. **Por favor permita que sus empleados revisen sus respuestas si piden verlos.**

Hay dos precauciones esenciales que se deben observar:

- **Bajo ninguna circunstancia** deben modificarse las entradas del empleado en la sección de la declaración del empleado.
- No haga declaraciones ni comentarios sobre el desempeño laboral del empleado, competencia ni calificaciones. Este cuestionario se utilizará para evaluar las funciones que constituyen la **posición**, no el rendimiento ni calificaciones del **empleado**.

1. Refleja el trabajo en resumen/definición de la clasificación (incluyendo las ediciones proporcionadas por el empleado) con precisión las responsabilidades generales y trabajo realizado por esta clasificación? Si no, por favor de aclarar.

2. Está de acuerdo con las tareas esenciales y clasificación de la proporcionada por el empleado? Si no, por favor de aclarar.

3. Está de acuerdo con las declaraciones de (CHCs) Conocimientos/Habilidades/Capacidad y calificación proporcionada por el empleado? Si no, por favor de aclara.

**Ciudad de San Luis y CPS HR Consulting**

Cuestionario de descripción de posición para clasificaciones - Debe de ser completado por el empleado

4. Está de acuerdo con la declaración de condición de trabajo? Si no, por favor de aclarar.

5. Está de acuerdo con la declaración de **la experiencia y de la educación**? Si no, por favor de aclarar.

6. Está de acuerdo con la declaración de **licencias/certificación**? Si no, por favor de aclarar.

7. Qué información adicional debe considerarse en la evaluación de la clasificación apropiada para este cargo?

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8. Se esta llevando acabo reorganización o otros cambios previstos o llevando a cabo en su organización que afectara el contenido o el nivel de este trabajo?

- Al marcar esta casilla, yo certifico que superviso al empleado que ha completado este cuestionario.

**Nombre:**

**Titulo de clasificacion:**

**Firma:**

**Fecha:**

**Cuidad de San Luis y CPS HR Consulting**

*Cuestionario de descripción de posición para clasificaciones - Debe de ser completado por el empleado*

**DECLARACIÓN DE JEFE DE DEPARTAMENTO**

Después de revisar el cuestionario de este empleado cuidadosamente para ver que este exacta y completa, complete los puntos descritos a continuación.

No llene estos artículos a menos que usted es el jefe de servicio aplicable. Su certificación a continuación significa que usted acepta la responsabilidad por la exactitud y completitud con la que todo el cuestionario se describen las funciones y responsabilidad del puesto de trabajo.

Si la declaración del empleado no expresa su visión de los deberes, responsabilidades y funciones esenciales que ha asignado al empleado, por favor aclarar o elaborar a continuación. **Por favor permita que sus empleados revisen sus respuestas si piden verlos.**

Hay dos precauciones esenciales que se deben observar:

- **Bajo ninguna circunstancia** deben modificarse las entradas del empleado en la sección de la declaración del Empleado.
- No haga declaraciones ni comentarios sobre el desempeño laboral del empleado, competencia ni calificaciones. Este cuestionario se utilizará para evaluar las funciones que constituyen la **posición**, no el rendimiento ni calificaciones del **empleado**.

Después de haber revisado este cuestionario y completado esta página, por favor, guarde este documento y envíarlo a HRDept@cityofsanluis.org.

Esta de acuerdo con la otra información proporcionada por el empleado y/o supervisor inmediato?

**SI**       **NO**

Si no, por favor de aclarar:

**Nombre:**

**Título de clasificación:**

**Firma:**

**Fecha:**

## **Appendix B: Schedule of Employees Interviewed During Study**

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**Project Consultant, Alfred Bingham**

**Monday, 11/7 San Luis, AZ**

Name	Classification	Time	Consultant
Yolanda Duenas	Office Manager	8:00	Al Bingham
Oswaldo Rodriguez	Lead Custodian	8:30	Al Bingham
Alfredo Leon	Building Maintenance Tech	9:00	Al Bingham
Group of 4 incumbents (Facilities)	Custodian	9:30	Al Bingham
<b>Break</b>			
Salvador Sandoval	Lead Mechanic	10:15	Al Bingham
Group of 3 incumbents (Fleet)	Mechanic	10:45	Al Bingham
Francisco De la Hoya	Senior Services Director	11:15	Al Bingham
<b>Lunch</b>			
Tadeo Martinez	Office Support Specialist	1:10	Al Bingham
Areiza Munoz	Office Support Specialist	1:45	Al Bingham
Xochital Lopez	Office Support Specialist	2:15	Al Bingham
Group of 2 incumbents (Youth Center)	Recreation Specialist	2:45	Al Bingham
<b>Break</b>			
Lizeth Chavez	Recreation Coordinator	3:30	Al Bingham
Jesus Meza	Recreation Coordinator	4:00	Al Bingham

**Tuesday, 11/8 San Luis, AZ**

Name	Classification	Time	Consultant
Benito Gonzales (Park)	Crew Leader Supervisor	8:00	Al Bingham
Group of 4 incumbents (Park Maintenance)	Maintenance Tech	8:30	Al Bingham
Herberto Vargas (PW)	Maint Supervisor	9:15	Al Bingham
Gilberto Torres (PW)	Wastewater Supervisor	10:00	Al Bingham
<b>Break</b>			
Antonio Sandoval (PW)	Water Supervisor	10:15	Al Bingham
Group of 2 incumbents (PW/WW)	Chief Operator	10:45	Al Bingham
Carlos Gonzales (PW/Highway)	PW Supervisor	11:30	Al Bingham
<b>Lunch</b>			
Group of 3 incumbents (PW/Highway)	Equipment Operator	1:00	Al Bingham
Meracruz Morado	Office Support Specialist	1:45	Al Bingham
Juan Castillo	Meter Reader	2:15	Al Bingham

**Project Consultant, Barbara Santos**

**Monday, 11/7 San Luis, AZ**

Name	Classification	Time	Consultant
Group of 3 incumbents (45 min)	Accountant	7:40	Barbara Santos
Francia Alonso	Administrative Assistant	8:25	Barbara Santos
Ayala, Sorocce	Administrative Assistant	9:00	Barbara Santos
Elizabeth Bonilla	Administrative Coordinator	9:35	Barbara Santos
<b>Break</b>			
Jose Guzman	Assistant Planner	10:20	Barbara Santos
Group of 3 incumbents	Court Clerk II	11:05	Barbara Santos
Josue Aranda	Court Compliance	11:45	Barbara Santos
<b>Lunch</b>			
Angelica Castro	Contractand Grant Coord	1:10	Barbara Santos
Maria Sabori	Senior HR Analyst	1:45	Barbara Santos
Dania Castillo	Economic Development Asst	2:20	Barbara Santos
Rogelio Martinez	Secretary	2:55	Barbara Santos
<b>Break</b>			
John Starkey	Building Safety Director	3:45	Barbara Santos

**Tuesday, 11/8 San Luis, AZ**

Name	Classification	Time	Consultant
Craig Higgins Jr.	Chief of Police	7:45	Barbara Santos
Kay Marion Macuil	City Attorney	8:30	Barbara Santos
Sonia Cornelio	City Clerk	9:15	Barbara Santos
<b>Break</b>			
Jenny Torres	Community Development Director	10:15	Barbara Santos
Andrea Ruiz	Court Administrator	11:00	Barbara Santos
<b>Lunch</b>			
Ketie St. Louis	Finance Director	1:00	Barbara Santos
Lizandro Galaviz	Parks and Recreation Director	1:45	Barbara Santos
Eulogio Vera	Public Works Director	2:30	Barbara Santos
<b>Break</b>			
Olivia Jenkins	Utilities Director	3:15	Barbara Santos
Tadeo De La Hoya	Interim City Administrator	4:00	Barbara Santos

**Project Consultant, Justin Tucker**

**Monday, 11/7 San Luis, AZ**

Name	Classification	Time	Consultant
Isaac Gutierrez	G.I.S. Technician	8:00	Justin Tucker
Jonathan Dumadag	I.T. Technician	8:35	Justin Tucker
Derek Duenas	I.T. Manager	9:15	Justin Tucker
Andrea Moreno	Police Administrator	9:50	Justin Tucker
<b>Break</b>			
Monica Ruiz	Communication Coordinator	10:30	Justin Tucker
Alexis Gomez Cordova	Transit Enforcement Officer	11:15	Justin Tucker
<b>Lunch</b>			
Luis Marquez	Code Enforcement Police Officer	1:00	Justin Tucker
Ernesto Prieto	Police Officer	1:35	Justin Tucker
Gerardo Zaragoza	Police Officer	2:15	Justin Tucker
Aurelio Junior Galvan	Police Officer	2:50	Justin Tucker
<b>Break</b>			
Alan Guevara	Police Corporal	3:30	Justin Tucker
Marco Santana	Police Sergeant	4:15	Justin Tucker

**Tuesday, 11/8 San Luis, AZ**

Name	Classification	Time	Consultant
Victor Figueroa	Police Lieutenant	8:00	Justin Tucker
Manuel Pelayo	Firefighter	8:35	Justin Tucker
Tyler Green	Firefighter/Paramedic	9:15	Justin Tucker
Aldo Garcia	Firefighter EMT	9:50	Justin Tucker
<b>Break</b>			
Rodrigo Valencia	Firefighter EMT	10:30	Justin Tucker
Noel Chavez (Group of 2 incumbents)	Paramedic	11:15	Justin Tucker
Guadalupe Gutierrez (Group of 2 incumbents)	Paramedic	11:15	Justin Tucker
<b>Lunch</b>			
Fabian Felix	Engineer/Paramedic	1:15	Justin Tucker
Jeremy Humphrey (Group of 3 incumbents)	Fire Captain	2:00	Justin Tucker
Enrique Lopez (Group of 3 incumbents)	Fire Captain	2:00	Justin Tucker
Jose Barragan (Group of 3 incumbents)	Fire Captain	2:00	Justin Tucker
<b>Break</b>			
Richard Bauermann	Fire Inspector	3:15	Justin Tucker
Henry Green	Fire Chief	4:00	Justin Tucker

## Appendix C: Position Allocations Master Spreadsheet

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## Recommended Allocations

Employee Name	Department	Existing Title	CPS Allocation Recommendation	Outcome
Alonso, Francia	City Administration	Administrative Assistant	Administrative Coordinator	Reclassification
Herrera, Laura <sup>2</sup>	City Administration	Assistant to Council/PIO	Assistant to Council/Public Information Officer	No Change, See Footnote
De La Hoya, Tadeo Azael	City Administration	Interim City Administrator	City Manager	No Change
Hagen, Christine	City Administration	Management Analyst	Management Analyst	No Change
Gimbut, Glenn	City Attorney/Prosecutor	Assistant City Attorney	Assistant City Attorney	No Change
Macuil, Kay Marion	City Attorney/Prosecutor	City Attorney	City Attorney	No Change
De La Vara, Jose A	City Attorney/Prosecutor	City Prosecutor	City Prosecutor	No Change
Taylor, Janet	City Attorney/Prosecutor	Legal Secretary	Legal Secretary	No Change
Vasquez, Sylvia	City Attorney/Prosecutor	Legal Secretary	Legal Secretary	No Change
Cornelio, Sonia	City Clerk	City Clerk	City Clerk	No Change
Lopez, Melissa	City Clerk	Deputy City Clerk	Deputy City Clerk	No Change
Castillo, Dania	Economic Development	Economic Development Assistant	Economic Development Assistant	No Change
Torres, Jenny	Economic Development	Community Development Director	Economic Development Manager	Title Change
Martinez, Rogelio <sup>3</sup>	Economic Development	Secretary	Office Assistant	New Class
Jouanne De Encinas, Roula T.	Finance	Accountant	Accountant I	Title Change
Luna, Debora Susana	Finance	Accountant	Accountant I	Title Change
Ramirez, Miguel Magana	Finance	Accountant	Accountant I	Title Change
Dominguez, Margarita	Finance	Accounting Specialist	Accounting Specialist	No Change
Hernandez, Ibett	Finance	Accounting Specialist	Accounting Specialist	No Change
Reyes, Luz	Finance	Accounting Specialist	Accounting Specialist	No Change
Cortes, Carlos	Finance	Assistant Finance Director	Assistant Director of Finance	Title Order
Vacant <sup>4</sup>	Finance	Utilities Director	Billing & Collections Manager	New Class
Leon, Laura	Finance	Administrative Coordinator	Business License Specialist	New Class
Perez, Jorge <sup>5</sup>	Finance	Administrative Coordinator	Administrative Coordinator	See Footnote
Castro, Angelica V	Finance	Contracts & Grants Coordinator	Contracts & Grants Coordinator	No Change

<sup>2</sup> Position of Assistant to Council PIO within City Administration was vacant when classification study began. Laura Herrera has since filled this position which was not changed; she was not included in the PDQ or interview process.

<sup>3</sup> Martinez Rogelio, in the existing title of Secretary, was moved from the Department of Planning and Zoning to City Administration based on CPS HR's organizational structure recommendations.

<sup>4</sup> Position of Utilities Director was held by Olivia Jenkins at time of study. During the study Olivia Jenkins, was moved to the position of Director of Human Resources within the Human Resources Department.

<sup>5</sup> Jorge Perez, currently in Administrative Coordinator, was promoted from Meter Reader Technician to Administrative Coordinator during the time of the study. Mr. Perez completed his PDQ based on the position of Meter Reader Technician.

Employee Name	Department	Existing Title	CPS Allocation Recommendation	Outcome
Henderson, Cynthia	Finance	Customer Service I	Customer Service Representative	Title Change
Munoz, Maria	Finance	Customer Service I	Customer Service Representative	Title Change
St. Louis, Keti	Finance	Finance Director	Director of Finance	Title Change
Velasco, Ivan <sup>6</sup>	Finance	Meter Reader	Meter Reader	See Footnote
Foster, Melissa <sup>7</sup>	Finance	Meter Reader Technician	Meter Reader	See Footnote
Castillo, Juan	Finance	Meter Reader Technician	Meter Reader Technician	No Change
Martinez, Tadeo	Finance	Office Support Specialist	Office Assistant	New Class
Cifuentes, Angelica	Finance	Purchasing Agent III	Purchasing Coordinator	New Class
Catania, Andrea	Finance	Risk and Property Manager	Risk Property Coordinator	Title Change
Hernandez, Diana M.	Fire Department	Administrative Assistant	Administrative Coordinator	Reclassification
Vacant	Fire Department	Assistant Fire Chief	Assistant Fire Chief	No Change
Barragan, Jose	Fire Department	Fire Captain	Fire Captain	No Change
Humphrey, Jeremy	Fire Department	Fire Captain	Fire Captain	No Change
Lopez, Enrique	Fire Department	Fire Captain	Fire Captain	No Change
Morris, Johnnie	Fire Department	Fire Captain	Fire Captain	No Change
Ramirez, Angel	Fire Department	Fire Captain	Fire Captain	No Change
Solis, Roberto	Fire Department	Fire Captain	Fire Captain	No Change
Green, Henry	Fire Department	Fire Chief	Fire Chief	No Change
Coronado, Arturo	Fire Department	Engineer/Paramedic	Fire Engineer	Reclassification
Felix, Fabian	Fire Department	Engineer/Paramedic	Fire Engineer	Reclassification
Gonzalez, Javier	Fire Department	Engineer	Fire Engineer	Title Change
Phillips, Justin	Fire Department	Fire Engineer	Fire Engineer	No Change
Silva, Francisco	Fire Department	Fire Engineer	Fire Engineer	No Change
Bauermann, Richard	Fire Department	Fire Inspector	Fire Inspector	No Change
Ceballos, Luis Enrique Junior	Fire Department	Firefighter EMT	Firefighter	Reclassification
Garcia, Aldo	Fire Department	Firefighter EMT	Firefighter	Reclassification
Garcia, Juan	Fire Department	Firefighter/Paramedic, Part-Time	Firefighter	Reclassification
Geith, Aaron	Fire Department	Firefighter	Firefighter	No Change
Gomez, Marco	Fire Department	Firefighter EMT	Firefighter	Reclassification
Green, Tyler	Fire Department	Firefighter/Paramedic	Firefighter	Reclassification
Hernandez, Javier	Fire Department	Firefighter/Paramedic, Part-Time	Firefighter	Reclassification
Mora, Cesar A	Fire Department	Firefighter/Paramedic	Firefighter	Reclassification
O'dell, Michael R	Fire Department	Firefighter EMT	Firefighter	Reclassification

<sup>6</sup> Position of Meter Reader was held by Teodoro Romero at the time of the study. Mr. Romero has since left the City and the position has been filled by Ivan Velasco and Melissa Foster, neither of whom were surveyed during the study. The recommendations made by CPS HR for the classification of Meter Reader are based on the PDQ completed by Mr. Romero.

<sup>7</sup> See previous footnote for Teodoro Romero.

Employee Name	Department	Existing Title	CPS Allocation Recommendation	Outcome
Pelayo, Manuel	Fire Department	Firefighter	Firefighter	No Change
Pelfrey, Colt A	Fire Department	Firefighter EMT	Firefighter	Reclassification
Rodarte, Rodrigo	Fire Department	Firefighter	Firefighter	No Change
Rodriguez, Mauro	Fire Department	Firefighter/Paramedic	Firefighter	Reclassification
Sillas, Jesus Alejandro	Fire Department	Firefighter EMT	Firefighter	Reclassification
Stevenson, Michael D	Fire Department	Firefighter EMT	Firefighter	Reclassification
Urzua, Alejandro	Fire Department	Firefighter/Paramedic, Part-Time	Firefighter	Reclassification
Valencia, Rodrigo	Fire Department	Firefighter EMT	Firefighter	Reclassification
Young, Brent T	Fire Department	Firefighter EMT	Firefighter	Reclassification
Aguirre, Luis	Fire Department	Fire Fighter/EMT, Part-Time	Fire Fighter	Reclassification
Campas, Jesus	Fire Department	Fire Fighter/EMT, Part-Time	Fire Fighter	Reclassification
Dinwiddie, Mathew	Fire Department	Fire Fighter/EMT, Part-Time	Fire Fighter	Reclassification
Elizarraras, Mario	Fire Department	Fire Fighter/EMT, Part-Time	Fire Fighter	Reclassification
Fuentes, David	Fire Department	Fire Fighter/EMT, Part-Time	Fire Fighter	Reclassification
Jacobo, Daniel	Fire Department	Fire Fighter/EMT, Part-Time	Fire Fighter	Reclassification
Teran, Omar	Fire Department	Fire Fighter/EMT, Part-Time	Fire Fighter	Reclassification
Zamora, Jose	Fire Department	Fire Fighter, Part-Time	Fire Fighter	Reclassification
Dominguez, Daniel	Fire Department	Fire Fighter	Fire Fighter	Reclassification
Flores, Emmanuel	Fire Department	Fire Fighter	Fire Fighter	Reclassification
Flores, Marcos	Fire Department	Fire Fighter	Fire Fighter	Reclassification
Ibarra, Alan	Fire Department	Fire Fighter	Fire Fighter	Reclassification
Ramirez, Eduardo	Fire Department	Fire Fighter/EMT	Fire Fighter	Reclassification
Zendejas, Guillermo	Fire Department	Fire Fighter	Fire Fighter	Reclassification
Beltran, Leanna	Fire Department	Office Support Specialist	Office Assistant	New Class
Chavez, Noel	Fire Department	Paramedic <sup>8</sup>	Firefighter	Reclassification See Footnote
Gutierrez, Guadalupe	Fire Department	Paramedic	Firefighter	Reclassification
Lopez, Isidro	Fire Department	Paramedic	Firefighter	Reclassification
Navarro, Ricardo	Fire Department	Paramedic	Firefighter	Reclassification

<sup>8</sup> The existing classification of Paramedic may be abolished as a result of this study. The City has requested that CPS HR survey the paramedic certification within the labor market in order to address specialty pay for the Firefighter classification during the compensation phase of the study. Incumbents will remain in their existing salary range pending results of the compensation study.

Employee Name	Department	Existing Title	CPS Allocation Recommendation	Outcome
Jenkins, Olivia <sup>9</sup>	Human Resources	Human Resources Director	Director of Human Resources	Title Change, <i>See Footnote</i>
Carbajal, Edgardo	Human Resources	HR Specialist	HR Coordinator	Reclassification
Heredia, Omar	Human Resources	HR Program & Training Coordinator	HR Coordinator	Title Change
Ramirez, Kassandra	Human Resources	HR Technician	HR Technician	No Change
Sabori, Maria	Human Resources	HR Senior Analyst	Senior HR Analyst	No Change
Sosa, Domingo	Information Technology	Graphic Arts Specialist	Graphics & Media Specialist	Title Change
Duenas , Derek V	Information Technology	I.T. Manager	IT Manager	No Change
Orozco Torres, Francisco A	Information Technology	I.T. Technician	IT Technician	No Change
Dumadag, Jonathan	Information Technology	I.T. Technician	Senior IT Technician	New Class
Leon, Aurora	Municipal Court	Chief Court Clerk	Chief Court Clerk	No Change
Ruiz, Andrea	Municipal Court	Court Administrator	Court Administrator	No Change
Morado, Maricruz	Municipal Court	Office Support Specialist	Court Clerk I	Reclassification
Rosado, Daysi	Municipal Court	Court Clerk I	Court Clerk I	No Change
Aranda, Elizabeth	Municipal Court	Court Clerk II	Court Clerk II	No Change
Barcenas, Crystal	Municipal Court	Court Clerk II	Court Clerk II	No Change
Kasid, Adilia	Municipal Court	Court Clerk II	Court Clerk II	No Change
Aranda, Josue	Municipal Court	Court Compliance Officer	Bailiff	Title Change
Mcmanus, Kristin C	Municipal Court	Magistrate	Magistrate	No Change
Fragozo Fierro, Crystal Alejandra	Parks and Recreation	Administrative Assistant	Administrative Assistant	No Change
Vacant	Parks and Recreation	Assistant Parks and Recreation Director	Assistant Director of Parks and Recreation	No Change
Duenas, Yolanda	Parks and Recreation	Office Manager	Facilities Supervisor	Reclassification
Leon, Alfredo	Parks and Recreation	Building Maintenance Technician	Building Maintenance Technician	No Change
Correa, Juan <sup>10</sup>	Parks and Recreation	Crew Leader Supervisor	Crew Leader Supervisor	See Note
Cortes, Maria	Parks and Recreation	Custodian	Custodian	No Change
Leon, Apolinar	Parks and Recreation	Custodian	Custodian	No Change
Rodriguez, Agustin	Parks and Recreation	Custodian	Custodian	No Change
Vanegas, Hector	Parks and Recreation	Custodian	Custodian	No Change
Vargas, Araceli C	Parks and Recreation	Custodian	Custodian	No Change
Galaviz, Lizandro	Parks and Recreation	Parks and Recreation Director	Director of Parks and Recreation	Title Change

<sup>9</sup> Olivia Jenkins held the existing title of Utilities Director at the time of the study. Since then, Ms. Jenkins has been moved to the position of Director of Human Resources. Ms. Jenkins completed a PDQ for the Utilities Director.

<sup>10</sup> The position of Crew Leader Supervisor within the Parks and Recreation Department was held by Benito Gonzalez at the time of the study. Mr. Gonzalez has since left the City and the position has been filled by Juan Correa who held the position of Maintenance Technician at the time. The recommendation made by CPS HR for the position of Crew Leader Supervisor was based on the PDQ completed by Mr. Benito, not Mr. Corraera as his PDQ was completed for his current position at the time.

Employee Name	Department	Existing Title	CPS Allocation Recommendation	Outcome
Rodriguez, Marcos Benito	Parks and Recreation	Driver	Driver	No Change
Seasonal <sup>11</sup>	Parks and Recreation	Head Lifeguard	Head Life Guard	No Change, <i>See Footnote</i>
Seasonal	Parks and Recreation	Head Lifeguard	Head Life Guard	No Change
Rodriguez, Osvaldo	Parks and Recreation	Lead Custodian	Lead Custodian	No Change
Seasonal <sup>12</sup>	Parks and Recreation	Lifeguard	Life Guard	No Change, <i>See Footnote</i>
Seasonal	Parks and Recreation	Lifeguard	Life Guard	No Change
Seasonal	Parks and Recreation	Lifeguard	Life Guard	No Change
Seasonal	Parks and Recreation	Lifeguard	Life Guard	No Change
Seasonal	Parks and Recreation	Lifeguard	Life Guard	No Change
Seasonal	Parks and Recreation	Lifeguard	Life Guard	No Change
Seasonal	Parks and Recreation	Lifeguard	Life Guard	No Change
Seasonal	Parks and Recreation	Lifeguard	Life Guard	No Change
Seasonal	Parks and Recreation	Lifeguard	Life Guard	No Change
Fregoso, Jesus <sup>13</sup>	Parks and Recreation	Maintenance Technician	Maintenance Specialist	<i>See Footnote</i>
Flores, Elvis	Parks and Recreation	Maintenance Technician	Maintenance Specialist	Reclassification
Gonzalez, Jesus Edward	Parks and Recreation	Maintenance Technician	Maintenance Specialist	Reclassification
Lopez, Jesus	Parks and Recreation	Maintenance Technician	Maintenance Specialist	Reclassification
Santiago, Jose	Parks and Recreation	Maintenance Technician/Irrigation Spec	Maintenance Specialist	Reclassification
Lopez, Victor	Parks and Recreation	Maintenance Technician	Maintenance Technician	No Change
Madrigal, Jose	Parks and Recreation	Maintenance Technician	Maintenance Technician	No Change
Munoz, Gerardo	Parks and Recreation	Maintenance Technician	Maintenance Technician	No Change
Urquijo, Salvador <sup>14</sup>	Parks and Recreation	Maintenance Technician	Maintenance Technician	<i>See Footnote</i>
Reyes, Victor	Parks and Recreation	Maintenance Technician	Maintenance Technician	No Change
Samaniego, Rodolfo	Parks and Recreation	Maintenance Technician	Maintenance Technician	No Change
Munoz, Areiza	Parks and Recreation	Office Support Specialist	Office Assistant	New Class
Velasquez, Omar	Parks and Recreation	Parks Supervisor	Parks Supervisor	No Change
Meza, Jesus	Parks and Recreation	Recreation Coordinator	Recreation Coordinator	No Change
Seasonal	Parks and Recreation	Recreation Intern	Recreation Intern	No Change

<sup>11</sup> The position of Head Lifeguard was evaluated based on PDQ completed by the incumbent of the position at the time.

<sup>12</sup> The position of Lifeguard was evaluated based on the PDQs completed by the incumbents of the position at the time.

<sup>13</sup> Jesus Fregoso was not with the City at the time of the study. CPS HR's recommendation for Mr. Fregoso's position was based on the evaluation of the PDQs and interviews of the other Maintenance Technicians.

<sup>14</sup> Urquijo Salvador was not with the City at the time of the study. CPS HR's recommendations Mr. Urquijo's position was based on the evaluation of the PDQs and interviews of the other Maintenance Technicians.

Employee Name	Department	Existing Title	CPS Allocation Recommendation	Outcome
Seasonal	Parks and Recreation	Recreation Intern	Recreation Intern	No Change
Seasonal	Parks and Recreation	Recreation Intern	Recreation Intern	No Change
Seasonal	Parks and Recreation	Recreation Intern	Recreation Intern	No Change
Seasonal	Parks and Recreation	Recreation Intern	Recreation Intern	No Change
Seasonal	Parks and Recreation	Recreation Intern	Recreation Intern	No Change
Seasonal	Parks and Recreation	Recreation Intern	Recreation Intern	No Change
Seasonal	Parks and Recreation	Recreation Intern	Recreation Intern	No Change
Juarez, Edgar <sup>15</sup>	Parks and Recreation	Recreation Coordinator	Recreation Coordinator	See Footnote
Vacant	Parks and Recreation	Recreation Coordinator	Recreation Coordinator	No Change
Vacant	Parks and Recreation	Recreation Specialist	Recreation Specialist	No Change
Varela, Lizette	Parks and Recreation	Recreation Specialist	Recreation Specialist	No Change
Villegas, Francisco	Parks and Recreation	Recreation Specialist	Recreation Specialist	No Change
Chavez, Lizeth	Parks and Recreation	Recreation Coordinator	Recreation Coordinator	No Change
Varela, Maria Teresa	Parks and Recreation	Senior Aide	Senior Services Assistant	Title Change
Luna, Jesus	Parks and Recreation	Senior Aide/Driver	Senior Services Assistant/Driver	Title Change
De La Hoya, Francisca	Parks and Recreation	Senior Services Director	Senior Services Manager	Title Change
Fernandez, Jeni	Parks and Recreation	Swimming Pool Coordinator	Recreation Specialist (Pool)	Reclassification
Guzman, Jose A	Planning and Zoning	Assistant Planner	Associate Planner	New Class
Jimenez, Martha R.	Planning and Zoning	Building Inspector	Building Inspector II	Reclassification
Campa, Joaquin	Planning and Zoning	Building Plans Examiner	Building Plans Examiner	No Change
Gonzalez, Elias	Planning and Zoning	Compliance Officer	Code Enforcement Officer	Title Change
Starkey, John	Planning and Zoning	Building Safety Director	Director of Planning and Zoning	No Change
Gutierrez, Isaac	Planning and Zoning	G.I.S. Technician	GIS Specialist	Title Change
Urrea, Angela M	Planning and Zoning	Office Support Specialist	Office Assistant	New Class
Pacheco, Roman	Planning and Zoning	Planning Technician	Planning Technician	No Change
Bonilla, Elizabeth	Police Department	Administrative Coordinator	Administrative Coordinator	No Change
Galaz, Heber A.	Police Department	Animal Control Officer	Animal Control Officer	No Change
Vacant	Police Department	Animal Control Officer	Animal Control Officer	No Change
Higgins Jr, Craig P	Police Department	Chief of Police	Chief of Police	No Change
Moreno, Andrea	Police Department	Police Administrator	Police Administrator	No Change
Vacant	Police Department	Commander	Police Commander	Title Change
Ruiz, Monica	Police Department	Communication Coordinator	Police Communications Supervisor	New Class
Arcos Jr, Humberto	Police Department	Communication Officer	Police Communications Officer	Title Change
Gonzalez, Elias Junior	Police Department	Communication Officer	Police Communications Officer	Title Change
Guevara, Gabriela	Police Department	Communication Officer	Police Communications Officer	Title Change

<sup>15</sup> Edgar Juarez was a Recreation Specialist at the time of the study. He was promoted to the position of Recreation Coordinator, not reclassified.

Employee Name	Department	Existing Title	CPS Allocation Recommendation	Outcome
Hernandez, Kimberly Shanell	Police Department	Communication Officer	Police Communications Officer	Title Change
Juarez, Nancy	Police Department	Communication Officer	Police Communications Officer	Title Change
Juarez, Pedro E	Police Department	Communication Officer	Police Communications Officer	Title Change
Maldonado, Vanessa	Police Department	Communication Officer	Police Communications Officer	Title Change
Martinez, Gilberto	Police Department	Communication Officer	Police Communications Officer	Title Change
Romo, Oscar	Police Department	Communication Officer	Police Communications Officer	Title Change
Velasco, Clarissa	Police Department	Communication Officer	Police Communications Officer	Title Change
Botello, Emmanuel <sup>16</sup>	Police Department	Police Officer	Police Officer	No Change, <i>See Footnote</i>
Guevara, Alan	Police Department	Police Corporal	Police Corporal	No Change
Miller, Damian	Police Department	Police Corporal	Police Corporal	No Change
Ramirez, Alejandro	Police Department	Police Corporal	Police Corporal	No Change
Alvarez-Castellanos, Miguel Angel	Police Department	Police Lieutenant	Police Lieutenant	No Change
Figueroa, Victor	Police Department	Police Lieutenant	Police Lieutenant	No Change
Aldama, Emmanuel	Police Department	Police Officer	Police Officer	No Change
Barron, Miguel A Junior	Police Department	Police Officer	Police Officer	No Change
Bobadilla, Yadira	Police Department	Police Officer	Police Officer	No Change
Cardenas, Ernesto Junior	Police Department	Police Officer	Police Officer	No Change
Carrillo, John	Police Department	Police Officer	Police Officer	No Change
Carrillo, Jose	Police Department	Police Officer	Police Officer	No Change
Curiel, Ramses	Police Department	Police Officer	Police Officer	No Change
De Leon, Jesus	Police Department	Police Officer	Police Officer	No Change
De Los Reyes, Juan Junior	Police Department	Police Officer	Police Officer	No Change
Espinoza, Roger	Police Department	Police Officer	Police Officer	No Change
Galvan, Aurelio Junior	Police Department	Police Officer	Police Officer	No Change
Gomez, Benjamin J	Police Department	Police Officer	Police Officer	No Change
Gonzalez, Karolina <sup>17</sup>	Police Department	Police Officer	Police Officer	<i>See Footnote</i>
Vacant	Police Department	Police Officer	Police Officer	No Change
Vacant	Police Department	Police Officer	Police Officer	No Change
Jessup, Richard	Police Department	Police Officer	Police Officer	No Change
Lara, Paulino	Police Department	Police Officer	Police Officer	No Change
Pacheco, Carlos	Police Department	Police Officer	Police Officer	No Change

<sup>16</sup> Emmanuel Botello held the position of Police Corporal at the time of the study. Mr. Botello has since moved to the position of Police Officer.

<sup>17</sup> Karolina Gonzalez, in the existing position of Police Officer, was hired after the study was conducted. She was not included in the PDQ or interview process and CPS HR recommendations are based on those of the Police Officers in the position currently.

*City of San Luis, Arizona  
Final Classification Report*

Employee Name	Department	Existing Title	CPS Allocation Recommendation	Outcome
Perez, Haziell	Police Department	Police Officer	Police Officer	No Change
Prieto, Ernesto	Police Department	Police Officer	Police Officer	No Change
Rojas Jr, Jose M	Police Department	Police Officer	Police Officer	No Change
Ruiz, Oscar R	Police Department	Police Officer	Police Officer	No Change
Valencia, Lino	Police Department	Police Officer	Police Officer	No Change
Valenzuela, Jaime	Police Department	Police Officer	Police Officer	No Change
Vasquez, Jose Armando	Police Department	Police Officer	Police Officer	No Change
Zaragoza, Gerardo	Police Department	Police Officer	Police Officer	No Change
Marquez, Luis	Police Department	Code Enforcement Police Officer	Police Officer [Code Enforcement]	Title Change
Ayala, Socorro	Police Department	Administrative Assistant	Police Records Clerk	Reclassification
Castro, Greta	Police Department	Police Records Clerk	Police Records Clerk	No Change
Vacant	Police Department	Police Sergeant	Police Sergeant	No Change
Reynoso, Nigel	Police Department	Police Sergeant	Police Sergeant	No Change
Santana, Marco	Police Department	Police Sergeant	Police Sergeant	No Change
Sauceda, Joel	Police Department	Police Sergeant	Police Sergeant	No Change
Zaragoza, Julian M	Police Department	Evidence Technician	Property and Evidence Technician	Title Change
Garcia, Adan	Police Department	Transit Enforcement Officer	Transit Enforcement Officer	No Change
Gomez Cordova, Alexis I	Police Department	Transit Enforcement Officer	Transit Enforcement Officer	No Change
Laguna, Lizeth	Police Department	Transit Enforcement Officer	Transit Enforcement Officer	No Change
Rios, Stephanie	Police Department	Transit Enforcement Officer	Transit Enforcement Officer	No Change
Torres, Melina	Police Department	Transit Enforcement Officer	Transit Enforcement Officer	No Change
Lopez, Xochitl	Public Works	Office Support Specialist	Administrative Assistant	Reclassification
Evangelista, Liliana	Public Works	Administrative Coordinator	Administrative Coordinator	No Change
Rojas, Manuel	Public Works	Assistant PW Director	Assistant Director of Public Works	Title Change
Gonzalez, Miguel	Public Works	Chief Operator	Chief Operator	No Change
Lopez, Alberto	Public Works	Chief Operator	Chief Operator	No Change
Vera, Eulogio	Public Works	Public Works Director	Director of Public Works	Title Change
Gonzalez, Andrei	Public Works	Electrician	Electrician	No Change
Correa, Enrique	Public Works	PW Equipment Operator	Equipment Operator	Title Change
Herrera, Edgar	Public Works	PW Equipment Operator	Equipment Operator	Title Change
Huerta, Jose	Public Works	PW Equipment Operator	Equipment Operator	Title Change
Molina, Jose Jesus	Public Works	PW Equipment Operator	Equipment Operator	Title Change
Padilla, Gustavo	Public Works	PW Equipment Operator	Equipment Operator	Title Change
Torres, Carlos	Public Works	PW Equipment Operator	Equipment Operator	Title Change
Zatarain, Eduardo	Public Works	PW Equipment Operator	Equipment Operator	Title Change
Galvan, Jesus	Public Works	PW Heavy Equipment Operator	Heavy Equipment Operator	Title Change
Magallanes, Cesar	Public Works	PW Heavy Equipment Operator	Heavy Equipment Operator	Title Change
Sandoval, Salvador Junior	Public Works	Lead Mechanic	Lead Mechanic	No Change
Flores, Norberto	Public Works	Maintenance Technician	Maintenance Specialist	New Class
Fragozo, Walter A	Public Works	Maintenance Technician	Maintenance Specialist	New Class

Employee Name	Department	Existing Title	CPS Allocation Recommendation	Outcome
Gonzalez, Samuel	Public Works	Maintenance Technician	Maintenance Specialist	New Class
Fregoso, Cervando <sup>18</sup>	Public Works	Maintenance Technician	Maintenance Specialist	New Class
Mojica Castaneda, Jose M	Public Works	Maintenance Technician	Maintenance Specialist	New Class
Solorzano, Pedro <sup>19</sup>	Public Works	Maintenance Technician	Maintenance Specialist	New Class
Vargas, Heriberto	Public Works	PW Maintenance Supervisor	Maintenance Supervisor	Title Change
Contreras, Alfonso	Public Works	Maintenance Technician	Maintenance Specialist	New Class
Duenas, Ramon Rodolfo	Public Works	Maintenance Technician	Maintenance Specialist	No Change
Arciga, Carlos F	Public Works	Mechanic	Mechanic	No Change
Ruiz, Jaime	Public Works	Mechanic	Mechanic	No Change
Sanchez, Jose Raul	Public Works	Mechanic	Mechanic	No Change
Boucher, Melissa <sup>20</sup>	Public Works	Office Clerk	Office Assistant	See Footnote
Gonzalez, Carlos	Public Works	PW Supervisor	Public Works Supervisor	No Change
Cazarez, Paul	Public Works	Wastewater Plant Operator	Wastewater Plant Operator	No Change
Cortez, Manuel	Public Works	Wastewater Plant Operator	Wastewater Plant Operator	No Change
Felix, Alvaro A	Public Works	Wastewater Plant Operator	Wastewater Plant Operator	No Change
Jauregui, Cesar	Public Works	Wastewater Plant Operator	Wastewater Plant Operator	No Change
Rosas, Abel P	Public Works	Wastewater Plant Operator	Wastewater Plant Operator	No Change
Sanchez, Ricardo	Public Works	Wastewater Plant Operator	Wastewater Plant Operator	No Change
Toro, Jose S	Public Works	Wastewater Plant Operator	Wastewater Plant Operator	No Change
Valenzuela, Leandro	Public Works	Wastewater Plant Operator	Wastewater Plant Operator	No Change
Torres, Gilberto	Public Works	Wastewater Supervisor	Wastewater Supervisor	No Change
Gil, Luis	Public Works	Water Systems Operator	Water Systems Operator	No Change
Hernandez, Samuel	Public Works	Water Systems Operator	Water Systems Operator	No Change
Herrera, Martin	Public Works	Water Systems Operator	Water Systems Operator	No Change
Lara, Oscar	Public Works	Water Systems Operator	Water Systems Operator	No Change
Lopez, Fausto	Public Works	Water Systems Operator	Water Systems Operator	No Change
Martinez, Nerys	Public Works	Water Systems Operator	Water Systems Operator	No Change
Torres, Jose	Public Works	Water Systems Operator	Water Systems Operator	No Change
Valenzuela, Sergio	Public Works	Water Systems Operator	Water Systems Operator	No Change
Sandoval, Antonio	Public Works	Water Supervisor	Water Systems Supervisor	Title Change

<sup>18</sup> At the time of the study, Cervando Fregoso, Maintenance Technician, was not with the City.

<sup>19</sup> At the time of the study, Pedro Solorzano was a Maintenance Technician and completed PDQ for Maintenance Technician. He has since moved to Equipment Operator.

<sup>20</sup> At the time of the study, the position of Office Clerk was held by Carlos Muela. Since then, Mr. Muela has left the City and the position has been filled by Melissa Boucher.

## **Appendix D: Approved Class Specification Template**

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**HUMAN RESOURCES DEPARTMENT**  
**City of San Luis**

*Margins: All set at 1"*  
*Font: Calibri 11 & 12*  
*Footer: Path & file name*

**[CLASS TITLE]**

*(If this is a career series it should be stated here)*

**DEFINITION:**

[General statement of the type and level of work performed; including a statement regarding the level of supervision received] ...and include in statement "and performs other related duties as required."

*Example: Under direction, performs professional level accounting functions...*

**DISTINGUISHING CHARACTERISTICS:**

[Use this field for career series to distinguish the level of work performed and supervision received at each level in the career series OR to distinguish from next promotional level not in the career series]

**DUTIES AND RESPONSIBILITIES:**

(Note in order of criticality or importance and lead in with statement below)

*The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.*

- [Should describe the vital and characteristic duties and responsibilities, it is not intended to be a list of all duties but a sample that clearly demonstrates the level of work.]
- [All clusters of duties should be related to the general statements of type and level of work in the definition]
- [All clusters of duties should be related to the general statements of type and level of work in the definition]
- [For simple job specs there should be approximately 7 items in this section, for combined/complex specs there should be approximately 10-12. The goal is to identify what is truly vital and characteristic of the class. This should result in a streamlined specification that contains the main elements of the classification.]
- Performs related duties as assigned. [always include statement at the end of duties section]

**EMPLOYMENT STANDARDS:**

**Knowledge of:**

- [A list of the most important areas of subject matter knowledge required]
- [Each statement should be related to one or more of the representative duties statements]
- [Common terms: Principles of, Practices of, Procedures, Techniques, etc.]



## HUMAN RESOURCES DEPARTMENT City of San Luis

- [The range for knowledge statements is 5-12 with simple specs having about 5-8 and complicated/ complex specs having 9-12. Keep in mind that all "knowledge of" statements are important but we only want to list the MOST important ones. Use your Subject Matter Experts SME's for this; with their opinion in mind use your professional judgment to build a streamlined list of most important and required knowledge statements]

### **Ability to:**

- [A list of the most important personal skills/abilities required]
- [Each statement should be related to one or more representative duties statement]
- [Common terms: Perform, Monitor, Review, Analyze, Collect, Evaluate, Coordinate, Organize, Develop, Establish, Assist, Research, Compose, Lead, Communicate, etc]
- [The range for ability statements is 5-12 with simple spec's having about 5-8 and complicated/ complex spec's having 9-12. Keep in mind that all "ability to" statements are important but we only want to list the MOST important ones. Use your SME's for this; with their opinion in mind use your professional judgment to build a streamlined list of most important and required ability statements]

### **MINIMUM QUALIFICATIONS:**

#### **Education, Training and Experience:**

[The minimum education or experience or combination, including allowance for experience to substitute for education]

EXAMPLE: Graduation from an accredited four-year college or university with a bachelor's degree in Business Administration, Public Administration or closely related area of study. Job related experience may substitute for the required education on year-for-year basis.

#### **LICENSES AND CERTIFICATES:**

[Drivers license requirement – choose one]

Default Statement: Certain positions within this classification may require driving. When driving is an essential function of the position, a valid Arizona driver license will be required at the time of appointment and must be maintained throughout employment.

OR

WHEN DRIVING IS A REQUIREMENT OF THE CLASSIFICATION: A valid driver license is required at the time of application. A valid Arizona driver license is required at the time of appointment and must be maintained throughout employment.

#### **Special Requirements:**

[Listing of other licenses and certificates required for the classification]

- Bilingual in Spanish preferred.
- Residency within 25 miles of San Luis and within the US required, San Luis residency preferred.
- Must have the ability to pass an extensive background check including polygraph examination.



**HUMAN RESOURCES DEPARTMENT**  
**City of San Luis**

**PHYSICAL AND MENTAL DEMANDS:**

[Optional: below is a sample of the type of language that can be included in job descriptions]

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Physical Demands**

While performing the duties of this job, the employee is regularly required to sit, walk and stand; talk and hear; use hands to finger, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is frequently required to lift up to 10 pounds unaided.

Specific vision abilities required for this job include close vision and the ability to adjust focus.

**Mental Demands**

While performing the duties of this class, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work, including frequent contact with customers and/or the public and dissatisfied/abusive individuals.

**Work Environment:**

The employee works in an office environment where the noise level is usually quiet. Certain positions within the classification may require availability to work flexible schedule.

**OTHER CONDITIONS OF EMPLOYMENT:**

[Optional section to address non-standard work schedule, nights, weekends, rotating shifts, etc]

Adopted: 00-00-00

BOS Approved: 00-00-00

Revised: 00-00-00

## **Appendix E: Existing Classification Structure (City Provided Organization Charts)**

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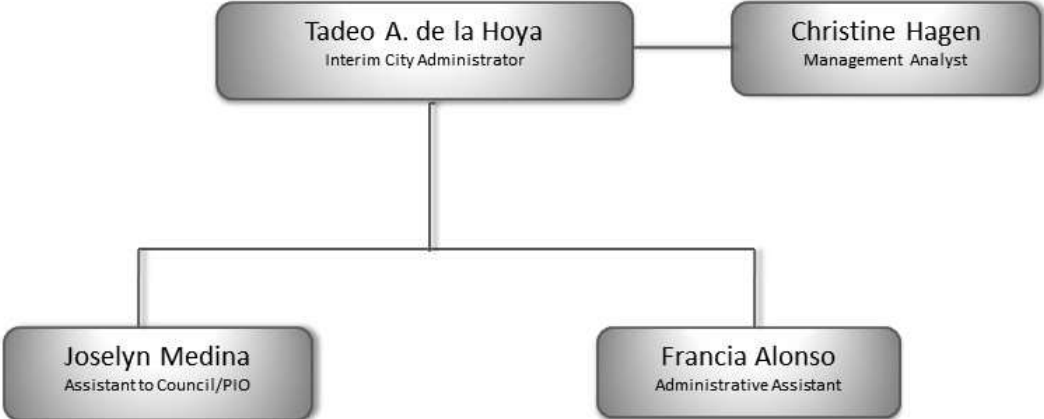
# CITY COUNCIL



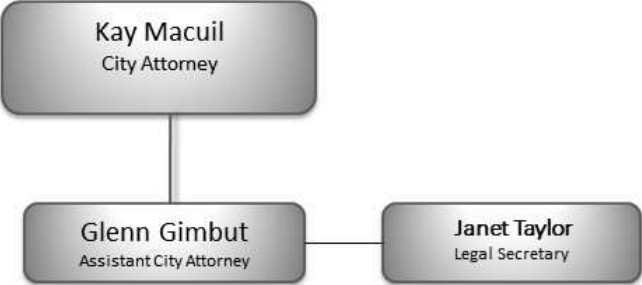
# DEPARTMENT HEADS



# CITY ADMINISTRATION



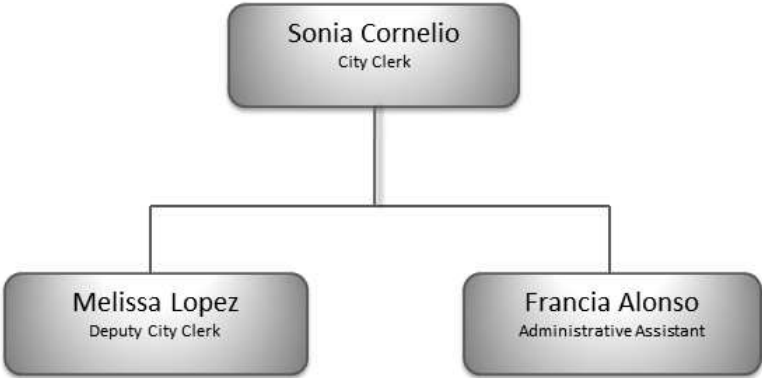
# CITY ATTORNEY



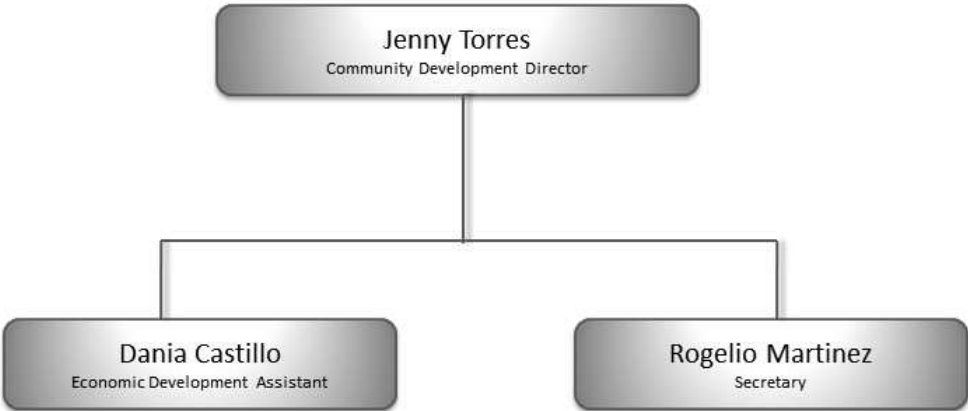
# CITY PROSECUTOR



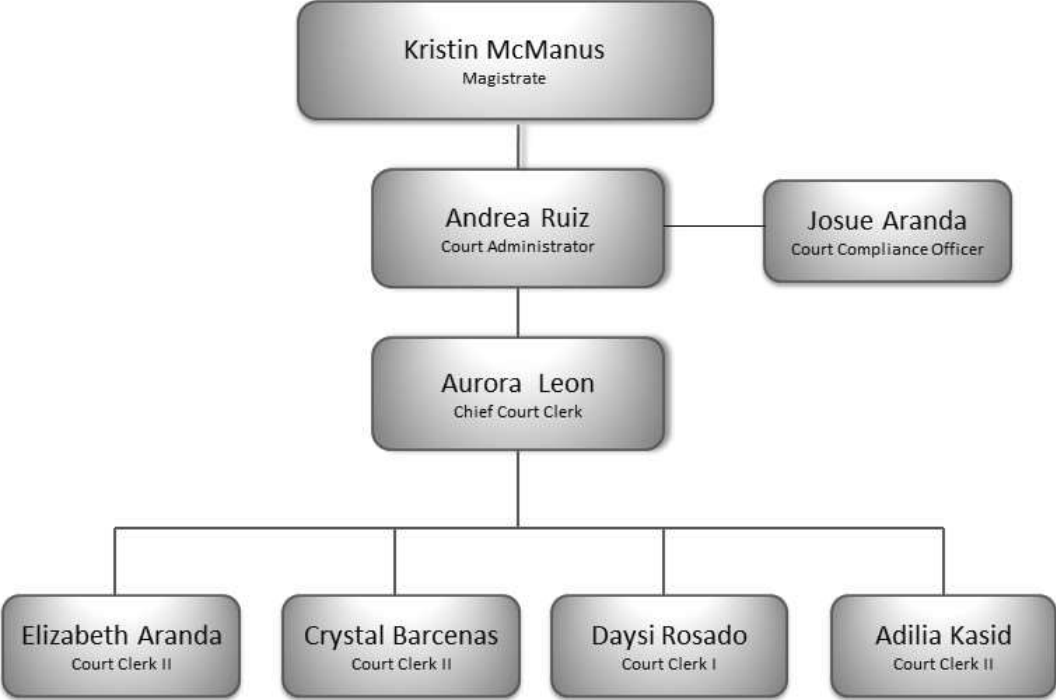
# CITY CLERK



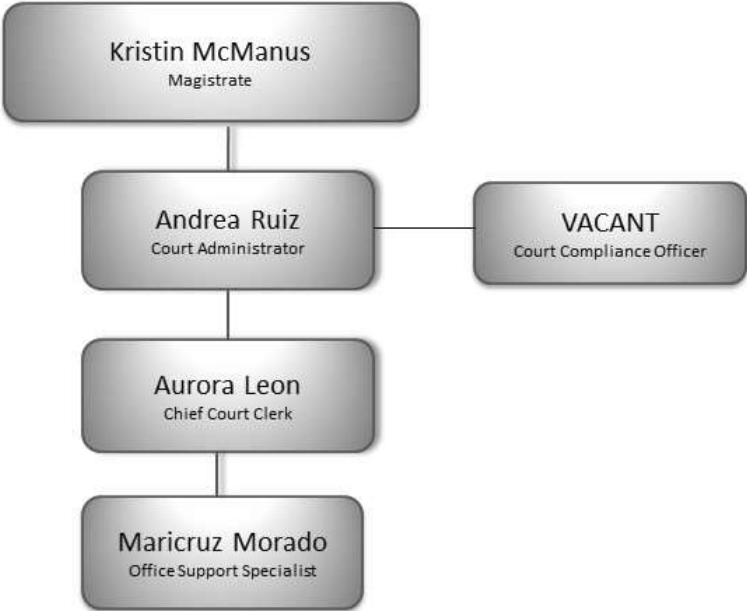
# COMMUNITY DEVELOPMENT



# COURT



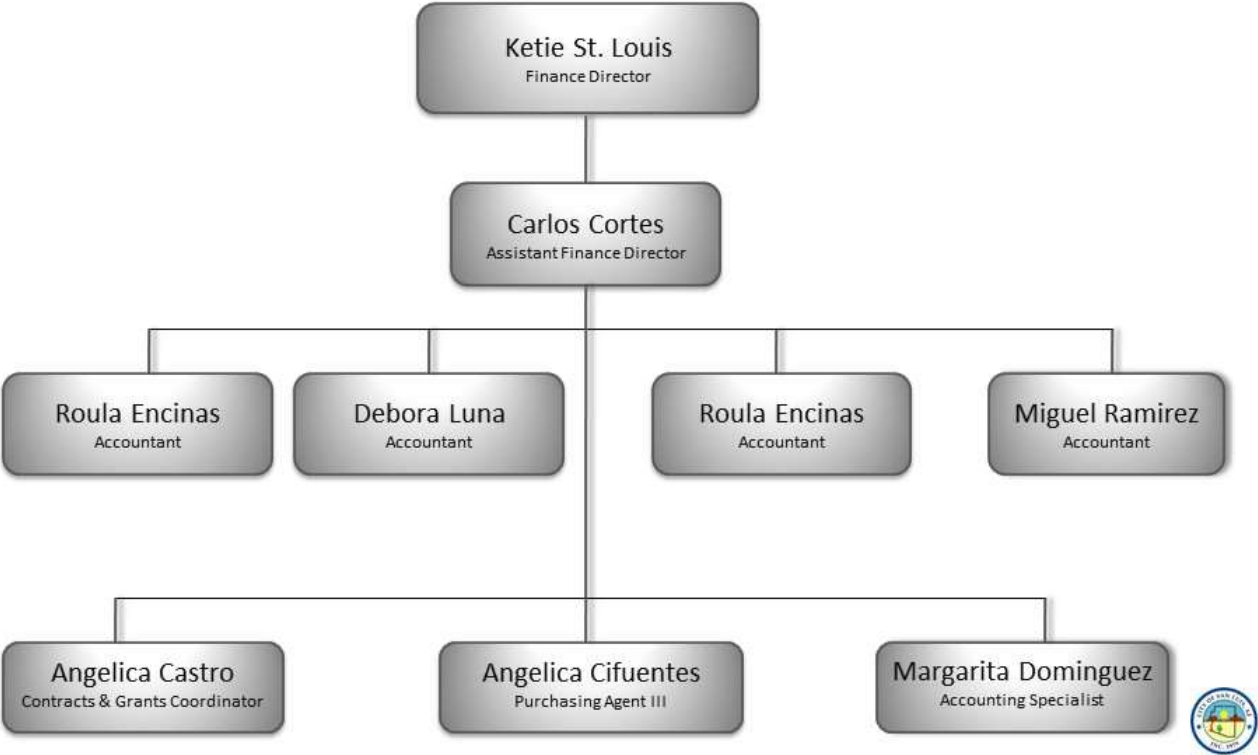
# COURT WARRANT



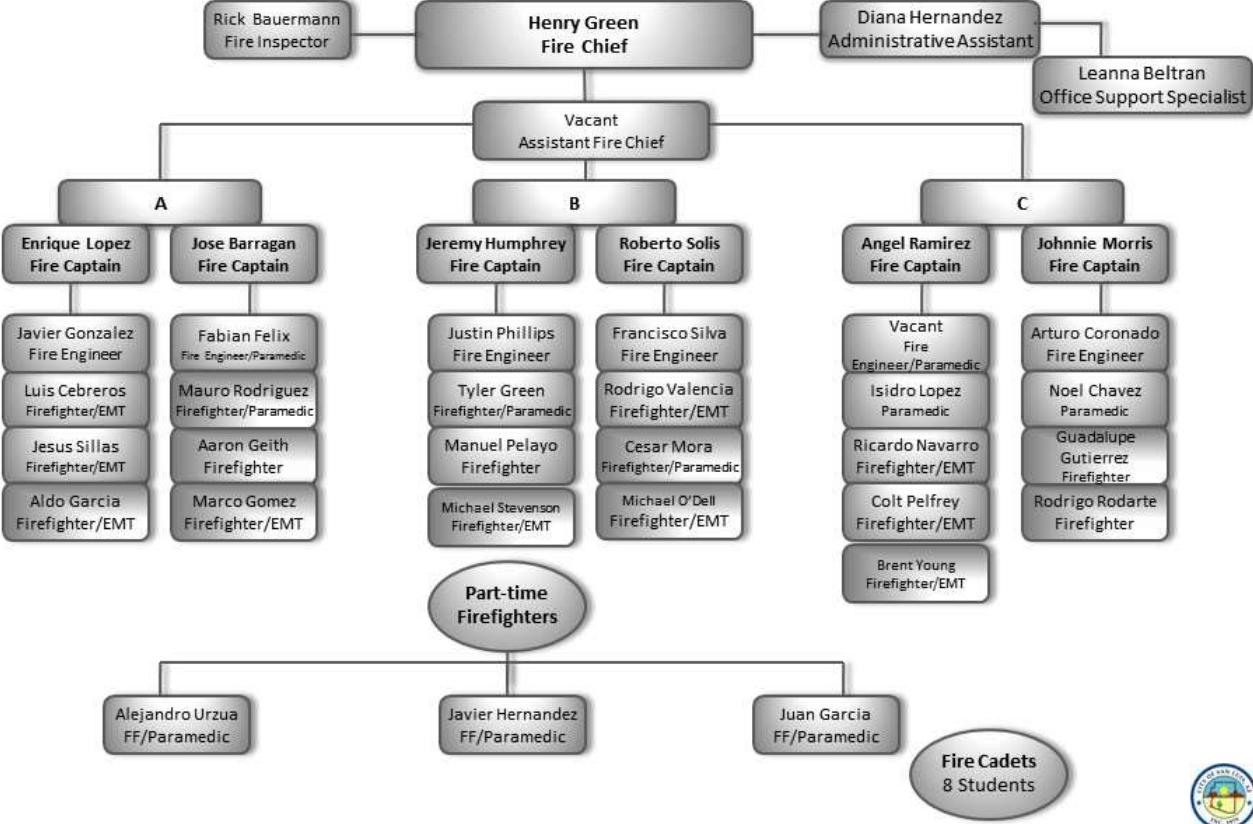
# FACILITIES



# FINANCE



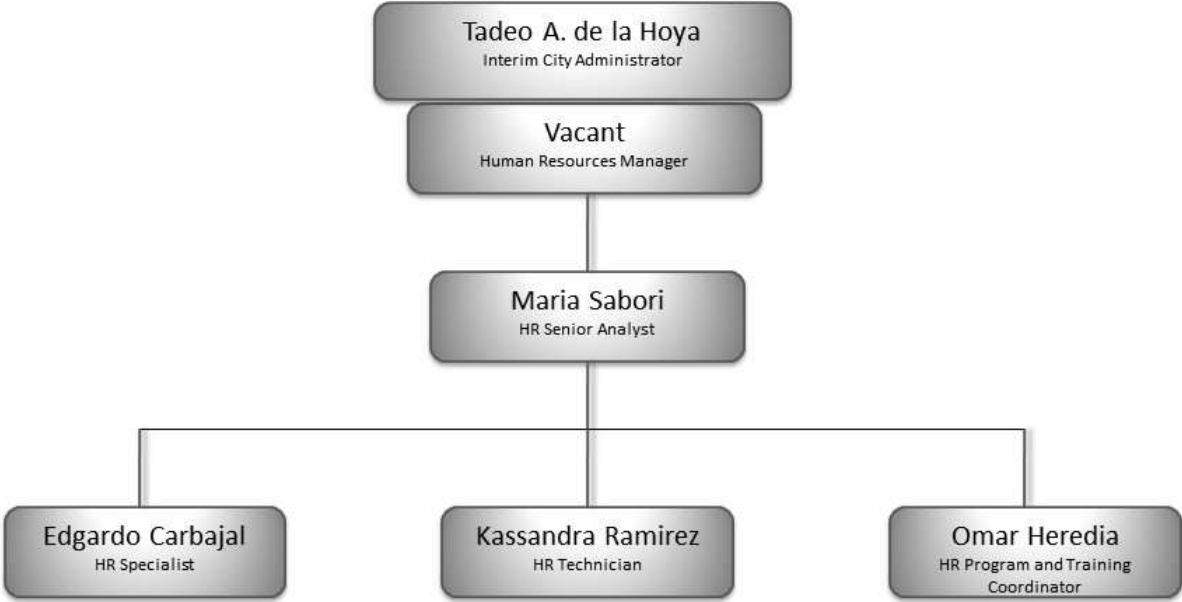
# FIRE



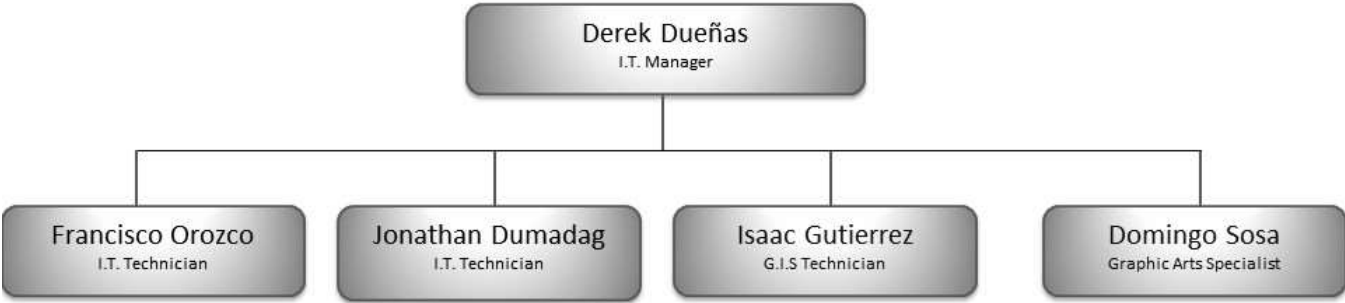
# FLEET SERVICES



# HUMAN RESOURCES



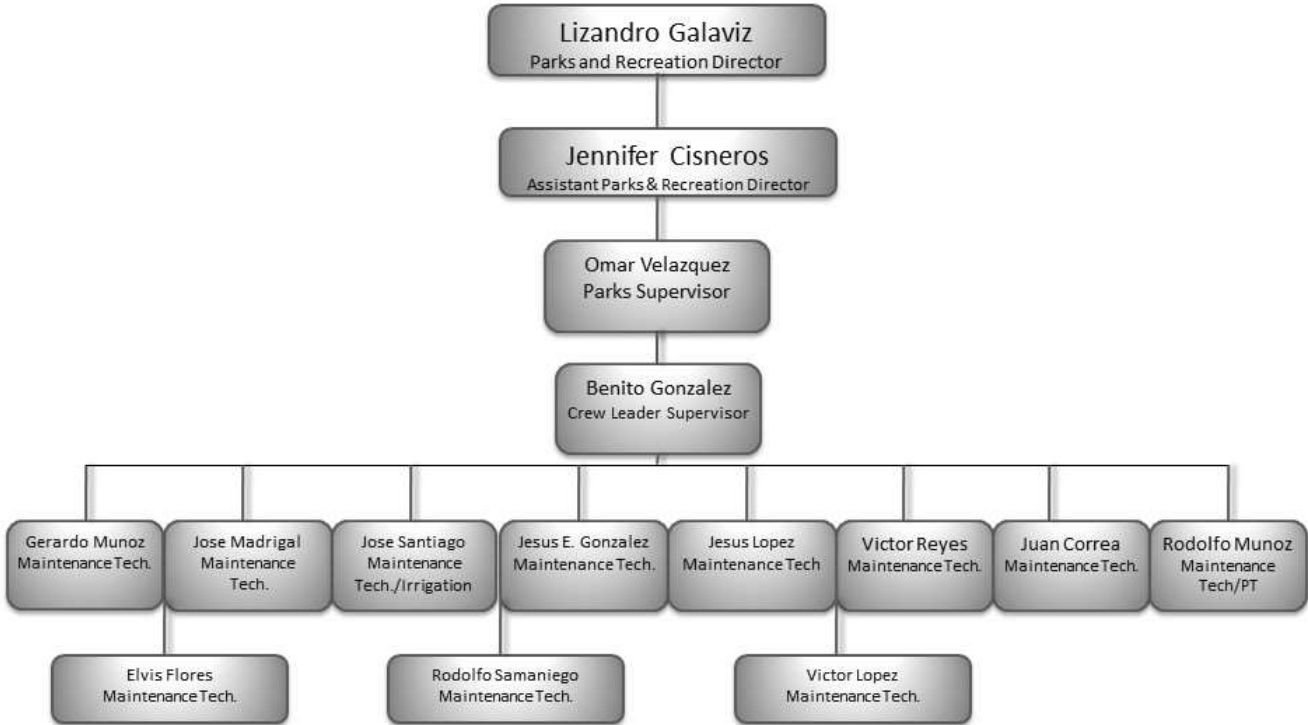
# INFORMATION TECHNOLOGY



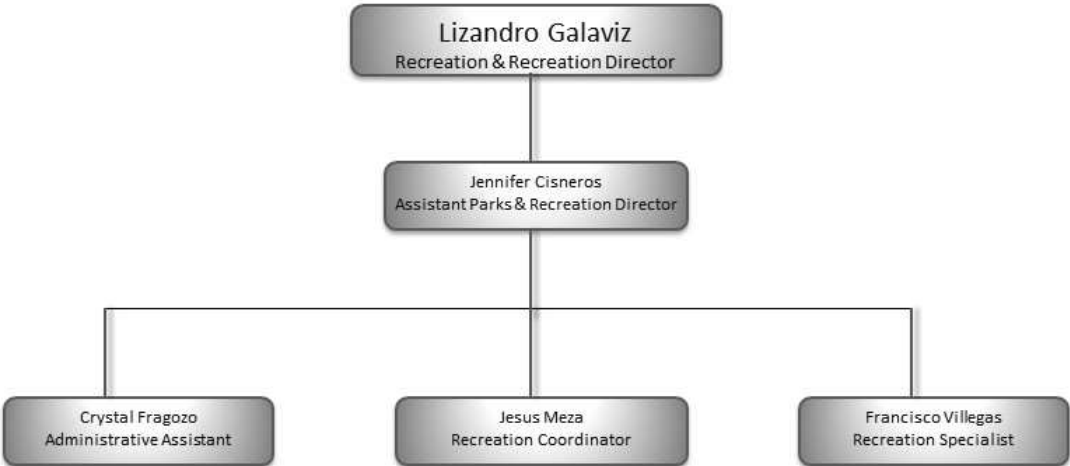
# INCUBATOR



# PARKS GROUNDS



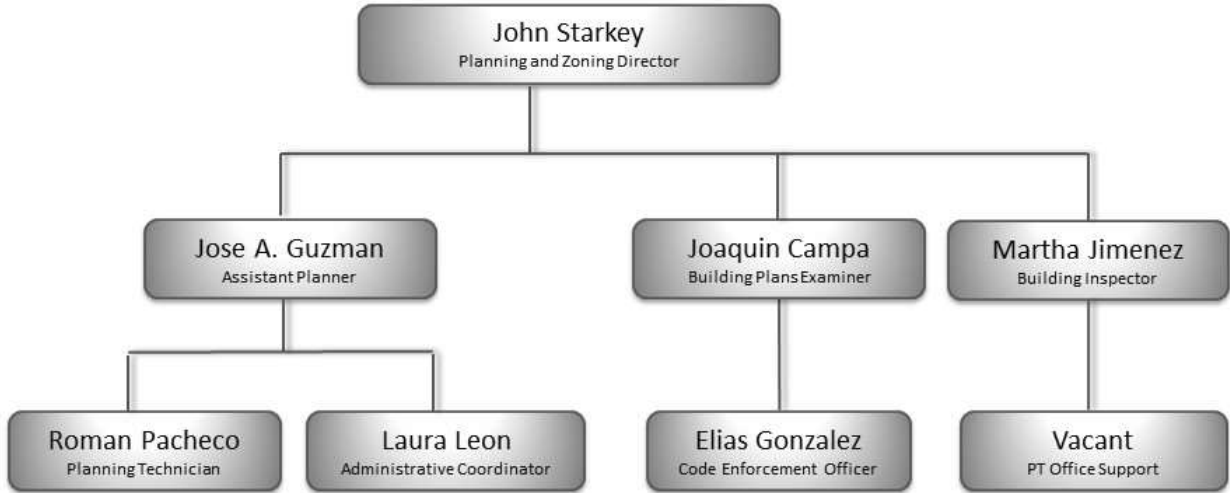
# RECREATION



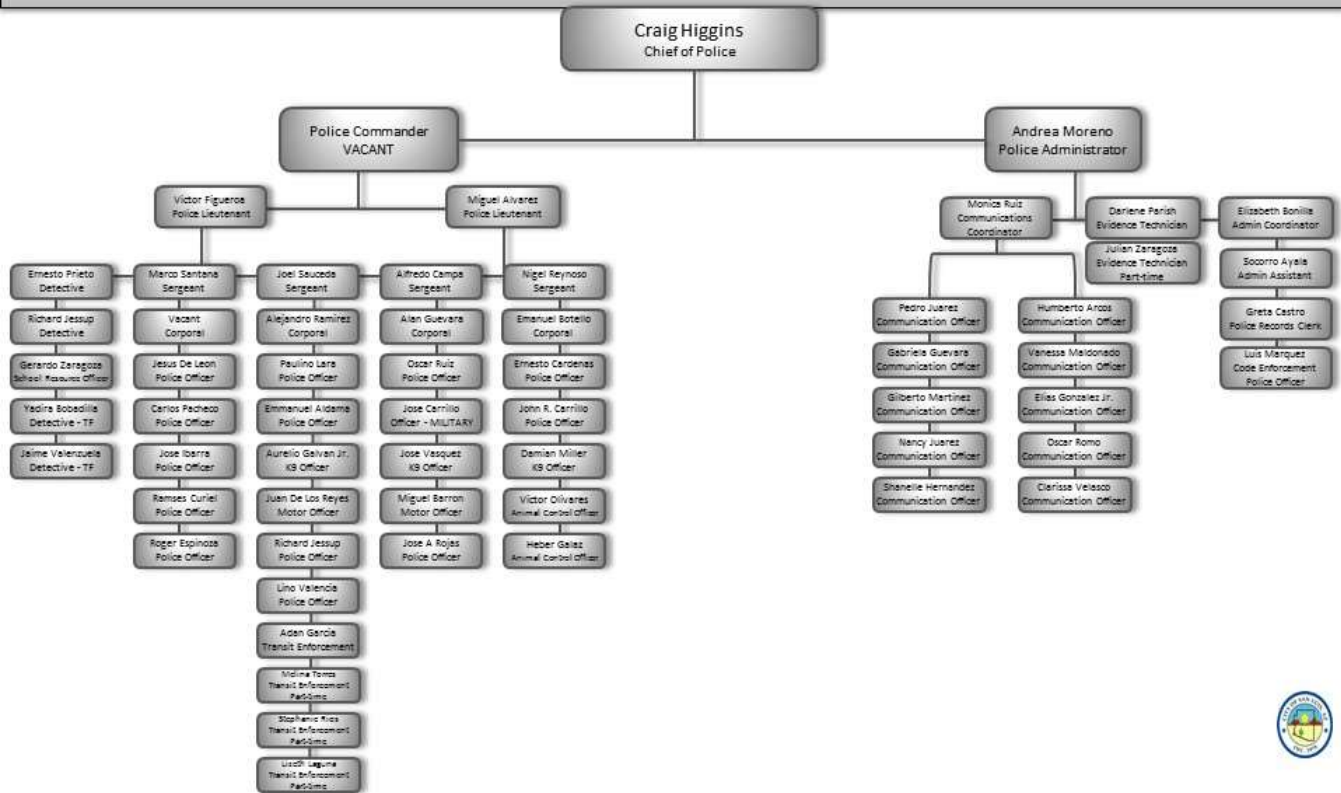
# AQUATIC CENTER



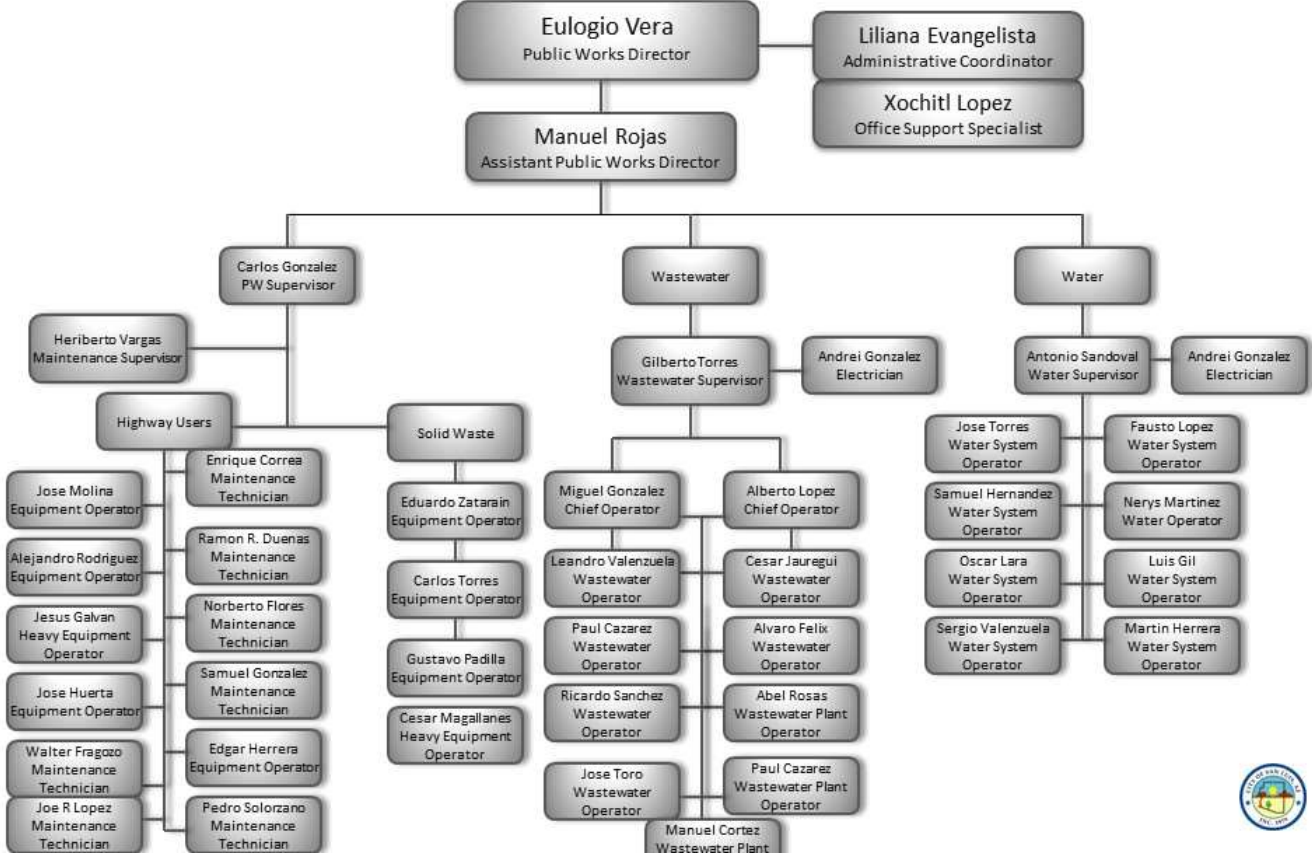
# PLANNING AND ZONING DEPARTMENT



# POLICE



# PUBLIC WORKS; Wastewater; Water; Highway Users; Solid Waste



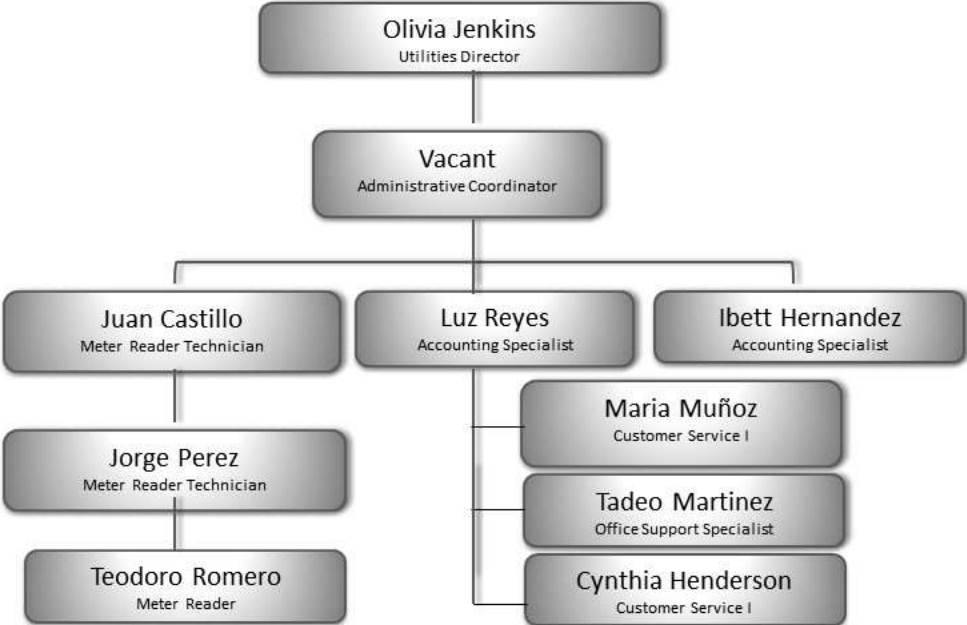
# RISK MANAGEMENT



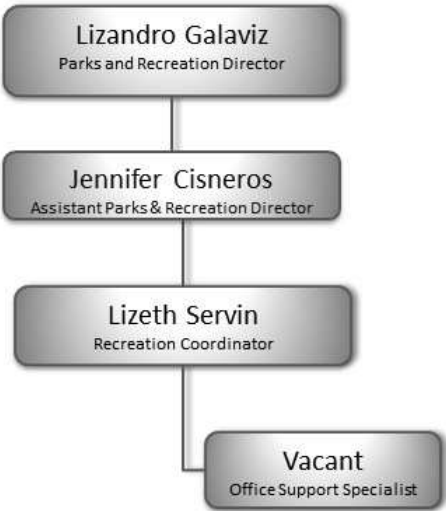
# SENIOR SERVICES



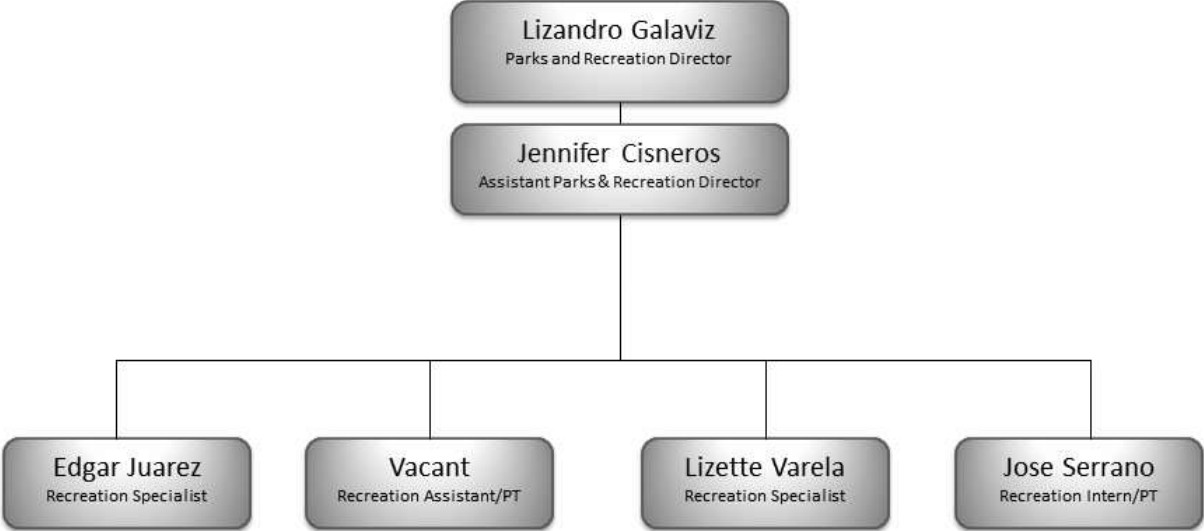
# UTILITIES



# CULTURAL CENTER



# YOUTH CENTER



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# Proposed

## City Manager

City **Manager** (1)  
 Assistant City **Manager** (1-Vacant)  
 Assistant to Council/ PIO (1)  
 Management Analyst (1)  
 \***Administrative Coordinator** (shared City Clerk)

### **ECONOMIC DEVELOPMENT**

Remain direct report of City Manager's Office  
**Economic** Development **Manager** (1)  
 Economic Development Assistant (1)  
**Office Assistant** (1)

## City Attorney/ Prosecutor

Remain direct report of City Manager's Office  
 City Attorney(1)  
 Assistant City Attorney (1)  
 Legal Secretary (1)

### **PROSECUTOR**

City Prosecutor (1)  
 Legal Secretary (1)

## Municipal Court

Remain direct report of City Manager's Office  
 Magistrate (1)  
 Court Administrator (1)  
**Bailiff** (1)  
 Chief Court Clerk (1)  
 Court Clerk II (3)  
 Court Clerk I (1) + (1 Vacant)  
**Court Interpreter** (1-New)

## City Clerk

Remain direct report of City Manager's Office  
 City Clerk (1)  
 Deputy City Clerk (1)  
 \***Administrative Coordinator** (shared City Mgr)

City Manager

Director

Assistant Director

Manager

Supervisor

### **Professional**

Subject Matter Expert – Principal  
 Advanced – Sr./Supervising  
 Journey - II  
 Entry - I

Coordinator

### **Technical/Clerical**

Specialist  
 Advanced – Senior/Lead/III  
 Journey - II  
 Entry - I

### **Skilled Trade**

Advanced – Lead/III  
 Journey - II  
 Entry - I

Trainee

Cadets/Intern

## Human Resources

Remain direct report of City Manager's Office  
 Director of Human Resources (1)  
 Senior HR Analyst (1)  
 HR Analyst (1-New)  
**HR Coordinator** (2)  
 HR Technician (1)

## Finance

Remain direct report of City Manager's Office  
 Director of Finance (1)  
 Assistant Director of Finance (1)  
**Accountant II** (New)  
 Accountant I (3)  
 Purchasing **Coordinator** (1)  
 Contracts & Grants **Coordinator** (1)  
 Accounting Specialist (1)  
**Administrative Coordinator** (1)

### **RISK MANAGEMENT**

Risk Property **Coordinator** (1)

### **BILLINGS & COLLECTIONS**

Absorb division formerly called "Utilities"  
 into Finance from Public Works  
 Billing & Collections Manager (1-Vacant)  
 Administrative Coordinator (1)  
 Meter Reader Technician (2)  
 Meter Reader (1)  
 Accounting Specialist (2)  
 Customer Service Representatives (2)  
**Office Assistant** (1)  
**Business License Specialist** (1-New)  
 Absorb class into Finance from Planning & Zoning

## Information Tech

Remain direct report of City Manager's Office  
 IT Manager (1)  
**Senior IT Technician** (1-New)  
 IT Technician (1)  
**Graphics & Media Specialist** (1)

# Proposed

## Police

Remain direct report of City Manager's Office

- Chief of Police (1)
- Police Commander (1-Vacant)
- Police Lieutenant (2)
- Police Sergeant (4)
- Police Corporal (3) + (1 Vacant)
- Police Officer (27)
- Police Officer [Code Enforcement] (1)
- Transit Enforcement Officer (5)

### **ADMINISTRATION**

- Police Administrator (1)
- Police Communications Supervisor (1)
- Police Communications Officer (10)
- Property & Evidence Tech (1)
- Administrative Coordinator (1)
- Administrative Assistant (1)
- Police Records Clerk (1)
- Animal Control Officer (2)

## City Manager

## Director

## Assistant Director

## Manager

## Supervisor

### **Professional**

- Subject Matter Expert – Principal
- Advanced – Sr./Supervising
- Journey - II
- Entry - I

### **Coordinator**

### **Technical/Clerical**

- Specialist
- Advanced – Senior/Lead/III
- Journey - II
- Entry - I

### **Skilled Trade**

- Advanced – Lead/III
- Journey - II
- Entry - I

### **Trainee**

- Cadets/Intern

## Fire

Remain direct report of City Manager's Office

- Fire Chief (1)
- Asst. Fire Chief (1- Vacant)
- Fire Captain (6)
- Fire Engineer (5)
- Fire Fighter (25)/ Part-Time (10)
- Fire Inspector (1)
- Administrative Coordinator (1-New)
- Administrative Assistant (1)
- Office Assistant (1)

## Planning & Zoning

Remain direct report of City Manager's Office

- Director of Planning & Zoning (1)
- Associate Planner (1-New)
- Assistant Planner (1)
- Planning Technician (1)

### **BUILDING SAFETY**

- Building Plans Examiner (1)
- Building Inspector II (1-New)
- Building Inspector I (1)
- Code Enforcement Officer (1)
- Office Assistant (1)
- GIS Specialist (1)
- Absorb class into Planning from IT

# Proposed

## Public Works

Remain direct report of City Manager's Office

### ADMINISTRATION

- Director Public Works (1)
- Assistant Director of PW (1)
- Administrative Coordinator (1)
- Administrative Assistant (1)

### HIGHWAY USERS & SOLID WASTE

Public Works Supervisor (1)

#### Highway

- Maintenance Supervisor (1)
- Maintenance Specialist (8)
- Maintenance Technician (2)
- Heavy Equipment Operator (1)
- Equipment Operator (4)

#### Solid Waste

- Heavy Equipment Operator (1)
- Equipment Operator (3)

### WASTEWATER

- Wastewater Supervisor (1)
- Electrician (1) *(shared with Water)*
- Chief Operator (2)
- Wastewater Plant Operator (8)

### WATER

- Water Systems Supervisor (1)
- Electrician (1) *(shared with Wastewater)*
- Chief Operator (1-New)
- Water Systems Operator (8)

### FLEET SERVICES

- Absorb division into Public Works
- [Office Manager moved to FACILITY MAINTENANCE]
- Lead Mechanic (1)
- Mechanic (3)
- Office Assistant (1)

City Manager

Director

Assistant Director

Manager

Supervisor

### Professional

- Subject Matter Expert – Principal
- Advanced – Sr./Supervising
- Journey - II
- Entry - I

Coordinator

### Technical/Clerical

- Specialist
- Advanced – Senior/Lead/III
- Journey - II
- Entry - I

### Skilled Trade

- Advanced – Lead/III
- Journey - II
- Entry - I

### Trainee

Cadets/Intern

## Parks & Recreation

Remain direct report of City Manager's Office

### ADMINISTRATION

- Parks & Recreation Director (1)
- Assistant P&R Director (1-Vacant)
- Recreation Specialist (1)
- Administrative Assistant (1)
- Recreation Coordinator (2)

### AQUATIC CENTER

- Recreation Specialist [Pool] (1)
- Head Life Guard (1)
- Life Guard (11)

### CULTURAL CENTER

- Recreation Specialist (1-Vacant)
- Office Assistant (1-Vacant)

### YOUTH CENTER

- Recreation Specialist (1)
- Recreation Intern (1)

### FACILITY MAINTENANCE

Absorb division into Parks & Recreation  
[Office Manager from FLEET SERVICES reclassified]

#### Facilities Supervisor (1)

- Lead Custodian (1)
- Custodian (5)
- Building Maintenance Technician (1)

### PARKS GROUNDS

- Parks Supervisor (1)
- Crew Leader Supervisor (1)
- Maintenance Specialist (5)
- Maintenance Technicians (5 + 1 PT)

### SENIOR SERVICES

- Senior Services Manager (1)
- Senior Services Assistant/ Part-Time (1)
- Senior Services Assistant/Driver (1)
- Driver (1)
- Office Assistant (1-New)



## AGENDA ITEM REVIEW FORM

### Special City Council Meeting

6.C.

**Meeting Date:** 06/07/2017

**Department Head:** Olivia Jenkins, Human Resources Director, Human Resources Department

**Submitted By:** Olivia Jenkins, Human Resources Director, Human Resources Department

**Action Requested:** Motion

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#### ITEM:

Discussion and possible action on any and all matters regarding instructions to staff to contract with Cooperative Personnel Services (CPS) HR Consulting for additional services not included in the initial contract to conduct a salary study and waiver of formal purchasing procedures as permitted under San Luis City Code Section 36.01(H). (**Olivia Jenkins, Human Resources Director**)

#### SUMMARY:

Human Resources is requesting additional services for any appeals the City may receive in response to the Salary Study by CPS HR Consulting.

#### Need for waiver of formal purchasing procedures:

Human Resources is seeking waiver of the purchasing procedures for expenses to be incurred not to exceed the amount of

**\$10,750.00** as permitted under the San Luis City Code Section 36.01 (H) . For a sum of \$10,750.00 the purchasing procedures of the City Code would be to request three (3) quotes. In this circumstance, the public treasury would be better served in not seeking three (3) quotes. The City hired the company CPS HR Consulting (CPS) for a Salary Study. Since CPS has been studying the job descriptions and comparable salaries, CPS would have the specific knowledge necessary to handle employee appeals from the determination in the Salary Survey.

#### Staff Recommendation:

Request and recommendation for the additional service is to provide classification consulting. This would allow the consultant to administer a formal appeal process to no more than 20% of employees, approximately 50 positions. Human Resources believes that it is in the best interest of employer and employees to invest in the appeal/hearing process, which would be conducted by the consultant for those positions/employees, who would meet the criteria for a revision of duties/assignments that may significantly affect the recommended class/position. The recommended class/position could potentially affect the compensation portion. Human Resources also believes that this opportunity should be provided to those employees and/or supervisors for a final review of the recommended classification conducted by the consultant. Consultant would consider the information presented and determine if the case would merit a review. Human Resources considers this request to be important in the current process.

#### RECOMMENDATION / SUGGESTED MOTION:

**I MOVE TO APPROVE CONTRACTING WITH CPS HR CONSULTING FOR THE ADDITIONAL SERVICES AS PRESENTED IN AN AMOUNT NOT TO EXCEED \$10,750.00 AND WAIVING FORMAL PURCHASING PROCEDURES.**

**Supporting information not attached to the Agenda Item Review Form:**

N/A

**Document to be Recorded?:** Yes

**City Clerk's Office**

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**Fiscal Impact**

**IS THERE FISCAL IMPACT ASSOCIATED WITH THIS ITEM:** Yes  
**CITY/STATE/FEDERAL FUNDS:** City  
**TOTAL:** \$10,750.00  
**BUDGETED AMOUNT:** \$0.00  
**AVAILABLE AMOUNT TO TRANSFER:** \$10,750.00  
**ACCT NAME & GL#/REMAINING BALANCE BEFORE PURCHASE:** 100-125-80005 Special Services  
\$32,364.39

**FISCAL IMPACT STATEMENT (IF THIS IS A BUDGET TRANSFER, YOU MUST ATTACH THE BUDGET ADJUSTMENT FORM):**

Budget transfer from GL Acct. 100-125-80005 Special Services to GL Acct. 100-125-80005 Contractual Services.

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**Attachments**

2nd Amendment to the Agreement-Appeal Process  
Basic Appeal Process  
Budget Adjustment Form

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**Second Amendment to Statement of Work 1**  
**Classification and Total Compensation Study – Appeals Process**

THIS SECOND AMENDMENT (this "Amendment") is made by and between Cooperative Personnel Services dba **CPS HR Consulting**, ("CPS HR") located at 241 Lathrop Way, Sacramento, California, 95815 and **the City of San Luis** ("Client" or "City") with offices at 1090 E. Union Street, San Luis, AZ 85349.

Whereas, CPS HR and Client have entered into the Agreement (as defined below); and

Whereas, CPS HR and Client desire to modify the Agreement on the terms and conditions set forth herein;

Now, therefore, CPS HR and Client agree as follows:

1. **Definitions:** The following definitions shall apply to this Amendment:
  - (a) **Agreement.** The term "Agreement" shall mean the Agreement dated August 15, 2016 by and between CPS HR and Client.
  - (b) **Other Terms.** Terms used and not defined in this Amendment shall have the meanings assigned to such terms in the Agreement.
2. **Modifications to the Agreement.** The Agreement is hereby modified to extend the completion date and to include appeals process and funding as follows:
  - (a) **Page 1, Section 1.** Provide classification consulting services to administer a formal appeal process for up to 50 positions.

**Once the City's Project Representative and other designated stakeholders have agreed to the concepts and classification specifications, CPS HR would conduct an Employee Review/Appeal Process. The following outlines the recommended process:**

- Incumbents will receive a notice with the updated classification specification.
- If incumbents are concerned with their classification specification, they can request further consideration of the recommended classification change to CPS HR.
- The CPS HR project team will review and research each response; this research may include requesting supervisor and manager feedback, contacting the employee and/or employee's supervisor and/or manager (via phone) to discuss the response, reconsideration of the PDQ or other submitted materials, and discussing any additional findings with immediate supervisors.
- The CPS HR Project Manager will meet via conference call with the City's Project Representative to provide an overview of the review process, some trends in appeals, and the recommended resolution of all appeal issues in order to reach consensus with the City prior to finalizing study recommendations.
- The CPS HR project team will respond to each employee and will communicate the response (change or unchanged) to the employee's classification.

The budget prepared for this option presumes that:

- Employees can only respond to the recommended allocation of their position and/or the contents of the classification specification.
- All classification related responses will be reviewed and, if reasonable, the classification specification will be modified.



*Deliverable: Evaluative narrative for each appeal filed to clarify disputes*

(b) **Page 1, Section 4.** July 31, 2017

(c) **Page 1, Section 7b.** This section will be updated to include an additional amount not to exceed \$10,750 for the appeals process.

b. CPS HR will invoice Client at the fixed fee rate of \$44,875 billed periodically based on completion of deliverables. Incidental reimbursable expenses such as travel, printing/copying, binding, and postage/delivery charges, etc., will be billed at actual cost and are not to exceed \$5,800. Mileage will be billed at the current U.S. Internal Revenue Services approved rate.

CPS HR will invoice Client for the appeals process at the rate of \$215 per position for up to 50 positions. The appeals process will not exceed \$10,750.

3. **Effective Date.** Each of the modifications set forth in Section 2 shall be effective on and after May 24, 2017.

4. **Legal Effect.** Except as expressly modified by this Amendment, all of the terms and conditions of the Agreement shall remain unchanged and in full force and effect.

IN WITNESS WHEREOF, CPS HR and CLIENT have executed this Amendment as of the date below.

**Cooperative Personnel Services dba  
CPS HR Consulting**

**City of San Luis**

**By:** \_\_\_\_\_  
Authorized Signature

**By:** \_\_\_\_\_  
Authorized Signature

Name: \_\_\_\_\_

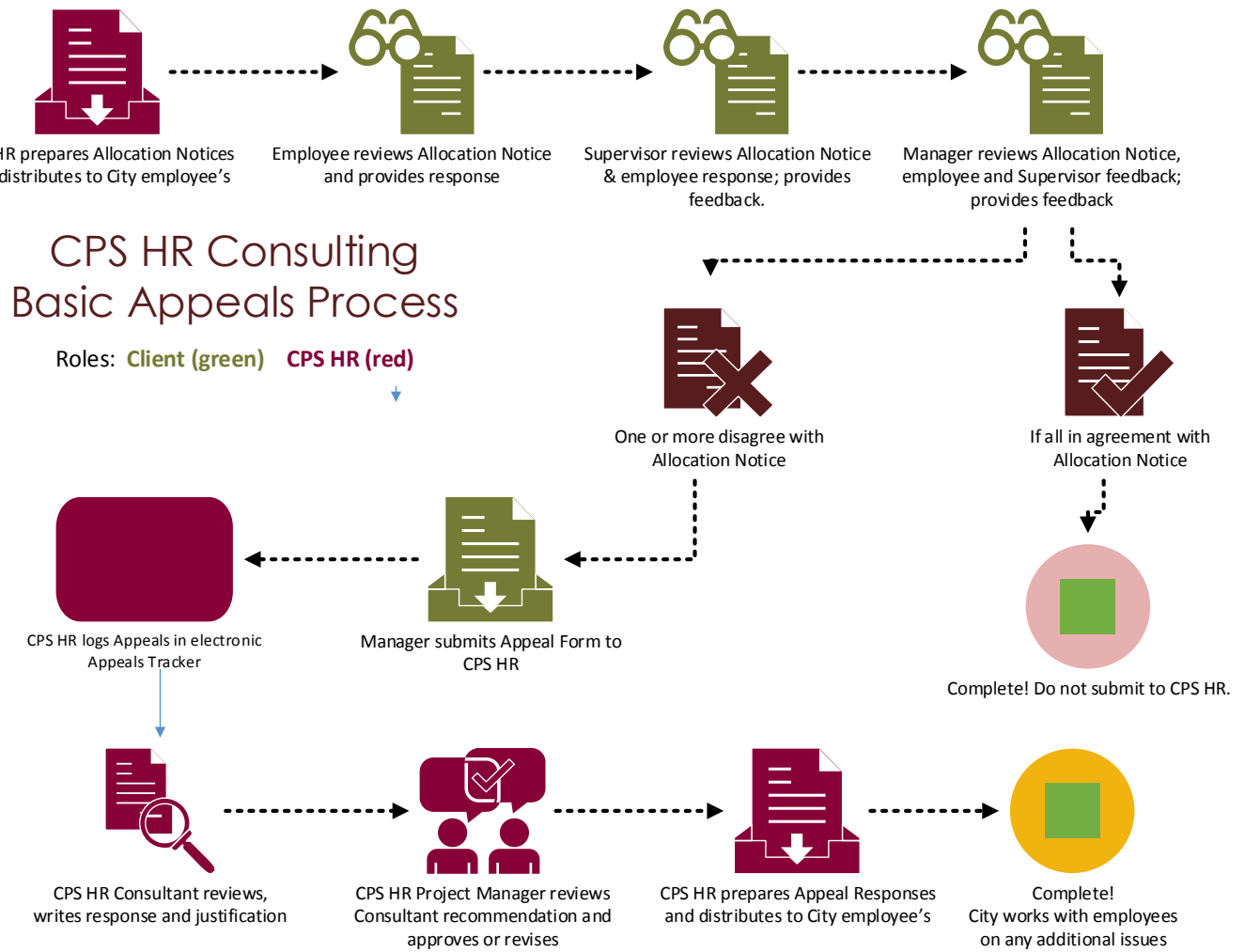
Name: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_



The CPS HR Consulting Appeals Process is presented in the flowchart below.



### Key Deliverables & Service

- Preparation and distribution of Allocation Recommendation Notices and blank Appeal Forms to employees.
- Review of Appeal Forms and any additional documentation to make Final Allocation Decision
- Prepare and distribute Final Allocation Decision; update or edit classification specification where appropriate

### Technology Used

- CPS HR Consulting will distribute Allocation Recommendation Notices to employees via email to organizational email accounts; the Allocation Recommendation will be attached as a PDF.
- CPS HR will log and review all Appeals in the Appeals Tracker, shown in figures 2a and 2b.

- All review, notes, and letter language will be written in this tracker and all work is visible to the City. Based on the City's desired involvement, the City may also be built into the workflow to review final allocation recommendations.
- CPS HR Consulting will distribute Final Allocation Notices to employees via email to organizational email accounts; the Final Allocation Notices will be attached as a PDF.
- CPS HR will provide the City with a timestamped log of all discussion and decisions that take place in the Appeals Tracker for each employee. Additionally, the City will receive a folder for each employee including the Allocation Recommendation Notice, PDQ, and Final Allocation Decision Notice.

Figure 2a: Appeals Tracker Datasheet

The screenshot shows a software interface for tracking appeals. At the top, there is a ribbon with various tool icons like 'Tags & Notes', 'E-mail a Link', 'Alert Me', 'RSS Feed', 'Connect to Outlook', 'Export to Excel', 'Open with Access', 'Open with Project', 'Print List', 'Customize Form', 'Edit List', 'New Quick Step', 'List Settings', 'Shared With', and 'Workflow Settings'. Below the ribbon, there is a search bar and a table of data. The table has the following columns: Employee Name, Assigned To, Appeal Type, Appeal Recommendation, CONS Reviewed, PM Reviewed, and Reviewed. The 'Reviewed' column contains a large grey redaction box. The table lists several employees and their appeal details.

Employee Name	Assigned To	Appeal Type	Appeal Recommendation	CONS Reviewed	PM Reviewed	Reviewed
AGUILAR, JENNIFER	Jennifer	Job Title	Deny	Yes	Pre-	
ANTHONY, BRUCE	Gwen	Other	No Contest	Yes	Pre-	
ARGARIN, MARLOU G.	Gwen	Job Title	Approve	Yes	Pre-	
AU, VINCENT	Geoff	Job Title	Deny	Yes	Pre-	
AVILA, VICTORIA	Gwen	Class Spec	Other	Yes	Pre-	
AVSAR, MURAT	Jennifer	Job Title	Other	Yes	Pre-	
AZUCENA, LUIS A	Geoff	Class Spec	Other	Yes	Pre-	
BARONA, PAUL A.	Geoff	Job Title	Deny	Yes	Pre-	
BAXTER, ANNE	Gwen	Job Title	Deny	Yes	Pre-	

Figure 2b: Appeals Tracker, Appeal Review Form

<b>Allocation Recommendation Appeals</b>			
<b>Appeal Detail</b>			
Employee Name	<input type="text" value=""/>	Employee Email	<input type="text" value=""/>
Current Title	<input type="text" value="HR SPECIALIST"/>	Recommended Allocation	<input type="text" value="HR Analyst"/>
Appeal Type	<input type="text" value="Job Title"/>	Assigned To	<input type="text" value="Jennifer"/>
<b>Appeal Status</b>			
CONS Reviewed	<input type="text" value="Yes"/>	PM Reviewed	<input type="text" value="Pre-"/>
	<input type="text" value=""/>		<input type="text" value="Reviewed"/>
<b>Appeal Decision and Notice</b>			
Appeal Recommendation	<input type="text" value="Deny"/>	Final Allocation:	<input type="text" value="HR Analyst"/>
		Update Class Spec:	<input type="text" value="No"/>
Appeals Notice Language	<p>CPS HR has reviewed the contents of the Position Description Questionnaire (PDQ) submitted for your position, and the comments in the Employee Review Form. These sources indicate that your duties are consistent with those described in the HR Analyst classification. The class of SR. HR Analyst is the most complex of the series. Incumbents are distinguished at this level for one or more of the following; participating in strategic planning, performance development plans, lead duties, more complex assignments (i.e., LOA management, executive recruitment, executive special projects, etc.).</p>		
Discussion	<input type="text" value=""/>		
Attachments	<p><a href="#">Click here to attach a file</a></p> <p><del>Allocation Notice-<input type="text" value=""/>.docx</del></p> <p><del><input type="text" value=""/>_statebar.doc</del></p>		





## AGENDA ITEM REVIEW FORM

### Special City Council Meeting

6.D.

**Meeting Date:** 06/07/2017

**Department Head:** Kay Macuil, City Attorney, Attorney's Office

**Submitted By:** Kay Macuil, City Attorney, Attorney's Office

**Action Requested:** Motion  
Resolution

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### ITEM:

Discussion and possible action on any and all matters regarding amending the Intergovernmental Agreement Council passed on April 12, 2017 and Resolution No. 1197. A Resolution of the Mayor and City Council of the City of San Luis, Arizona approving an Intergovernmental Agreement between the City of San Luis, Arizona and Gadsden Elementary School District No. 32 regarding improvements to address traffic and repealing Resolution No. 1188. **(Kay Marion Macuil, City Attorney and Eulogio Vera, Public Works Director)**

### SUMMARY:

#### **Background**

Gadsden Elementary School District No. 32 (School District) has constructed additional classrooms for Ed Pastor Elementary School and a new District Administration building on the Ed Pastor Elementary campus. Since there are traffic impacts from the increase in classrooms and the moving of administrative personnel to the location, the School District committed to having a traffic study done and to following its recommendations. The traffic study requires a traffic light at the intersection of 6th Avenue and Juan Sanchez Boulevard. The traffic study also concluded that some stacking may occur on the east side of 6th Avenue for Ed Pastor Elementary School.

On April 12, 2017, City Council passed a proposed Intergovernmental Agreement which included a turn lane which would address this stacking issue. The School Board never took action on the item.

It is staff's understanding that the school was dealing with two issues.

1. an unaffordable first estimate for the work for the turn lane. However, it is our understanding that issue has been resolved with their contractor. The City reached out to offer to do the work at what the City estimated the work would cost if the School would pay, but that has turned out to be unnecessary.
2. The School also pointed out that the traffic study was confusing on the point of the turn lane/stacking lane as to whether or not it was necessary. Therefore in the new proposal, the language by-passes reference to the traffic study by saying that the parties agree to the turn lane/stacking lane. The engineer for the traffic study is in the process of drafting more in-depth analysis.

City staff has met with the School District in March or early April to work out a time line for completion of the infrastructure and to share in the cost of the traffic light. This intergovernmental agreement is the assurance that the traffic study recommendations will be put in place in a timely manner. The plans for the turn lane / stacking lane have already been submitted and the City's comments have already been addressed.

Staff recommends approval of this Intergovernmental Agreement.

**RECOMMENDATION / SUGGESTED MOTION:**

**I MOVE TO APPROVE AND ADOPT RESOLUTION 1188.**

**Supporting information not attached to the Agenda Item Review Form:**

N/A

**Document to be Recorded?:** Yes

**City Clerk's Office**

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**Fiscal Impact**

<b>IS THERE FISCAL IMPACT ASSOCIATED WITH THIS ITEM:</b>	Yes
<b>CITY/STATE/FEDERAL FUNDS:</b>	To be Determined
<b>TOTAL:</b>	To be Determined
<b>BUDGETED AMOUNT:</b>	To be Determined
<b>AVAILABLE AMOUNT TO TRANSFER:</b>	N/A
<b>ACCT NAME &amp; GL#/REMAINING BALANCE BEFORE PURCHASE:</b>	N/A
<b>FISCAL IMPACT STATEMENT (IF THIS IS A BUDGET TRANSFER, YOU MUST ATTACH THE BUDGET ADJUSTMENT FORM):</b>	

The City's obligation for the Traffic Light is planned for the 2018-2019 fiscal year under this Intergovernmental Agreement.

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**Attachments**

Resolution No. 1197

IGA Gadsden School District #32

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# *Resolution*

OFFICE OF THE  
MAYOR  
CITY OF SAN LUIS

No. 1197

**A RESOLUTION OF THE MAYOR AND CITY COUNCIL OF THE CITY OF SAN LUIS, ARIZONA, AUTHORIZING AND DIRECTING THE ENTERING INTO AN INTERGOVERNMENTAL AGREEMENT WITH GADSDEN ELEMENTARY SCHOOL DISTRICT #32 REGARDING IMPROVEMENT TO ADDRESS TRAFFIC AND REPEALING RESOLUTION NO. 1188.**

**BE IT RESOLVED** by the Mayor and City Council of the City of San Luis, Arizona, as follows:

**Section 1.** That it is deemed in the best interest of City of San Luis and its residents that an Intergovernmental Agreement with Gadsden Elementary School District #32 regarding improvement to address traffic.

**Section 2.** That a true copy of said Intergovernmental Agreement is incorporated herein as though fully set forth again in full.

**Section 3.** That Resolution No. 1188 is hereby repealed which adopted an earlier version of said Intergovernmental Agreement passed by City Council on April 12, 2017 but never passed by the School Board for the Gadsden Elementary School District #32.

**Section 4.** That the Mayor or City Manager and/or his designee are hereby authorized and directed to execute this Intergovernmental Agreement on behalf of the City of San Luis and to take any and all actions as may be necessary to put the agreement into effect.

**Section 5.** That the San Luis City Clerk and/or her designee is authorized and directed to maintain this Intergovernmental Agreement in the official files of the City Clerk and to deliver it to Gadsden Elementary School District #32.

[Signature page on next page.]

**PASSED, ADOPTED and APPROVED** by the Mayor and City Council of the City of San Luis, Yuma County, Arizona, this \_\_\_\_ day of June, 2017.

\_\_\_\_\_  
Gerardo Sanchez, Mayor

**ATTEST:**

**APPROVED AS TO FORM:**

\_\_\_\_\_  
Sonia Cornelio, City Clerk

\_\_\_\_\_  
Kay Marion Macuil, City Attorney

**INTERGOVERNMENTAL AGREEMENT BETWEEN CITY OF SAN LUIS, ARIZONA  
AND GADSDEN ELEMENTARY SCHOOL DISTRICT #32 REGARDING  
IMPROVEMENTS TO CONFORM TO TRAFFIC STUDY FOR DEVELOPMENT OF  
NEW CLASSROOMS AND NEW ADMINISTRATION BUILDING**

THIS AGREEMENT, made and entered into this \_\_\_\_ day of \_\_\_\_\_, 2017 by and between the CITY OF SAN LUIS, a municipal corporation of the State of Arizona, hereinafter referred to as "CITY" and the GADSDEN ELEMENTARY SCHOOL DISTRICT #32, hereinafter referred to as "DISTRICT"; the CITY and DISTRICT hereinafter collectively referred to as the "PARTIES."

WHEREAS, the CITY is authorized by A.R.S. §11-952 to enter into this AGREEMENT;  
and

WHEREAS, the DISTRICT is authorized by A.R.S. §11-952 to enter into this AGREEMENT; and

WHEREAS, pursuant to Section 11-951 *et seq.*, cities and Arizona Union School Districts (districts) may enter into AGREEMENTS for the cooperative development, design, construction, maintenance, and operation of essential infrastructure, and

WHEREAS; the DISTRICT is constructing additional classrooms for Ed Pastor Elementary School and a new District Administration building and as part of those improvements committed to performing a traffic study and constructing such improvements as required by said traffic study; and

WHEREAS, said traffic study called for the installation of a traffic light at the intersection of Sixth Avenue and Juan Sanchez Blvd. and a deceleration and stacking lane on the east side of Sixth Ave. for Ed Pastor Elementary School (the "infrastructure");

WHEREAS, it is the desire of the PARTIES to act collaboratively in developing the mutually needed infrastructure called for by said traffic study;

NOW, THEREFORE, FOR AND IN CONSIDERATION of the mutual promises, benefits and AGREEMENTS of the PARTIES herein contained and as more fully explained below, it is agreed as follows:

**Section 1. Purpose**

The purpose of this AGREEMENT is to establish the rights, duties and responsibilities of the PARTIES for the development, and construction of the above-referenced infrastructure ("infrastructure") and the collaboration of the PARTIES for the development and construction thereof.

## **Section 2. Term**

This AGREEMENT will become effective as of the date indicated above, and will terminate five (5) years thereafter, or at such time as the infrastructure (“infrastructure”) is developed and accepted by CITY.

## **Section 3. Infrastructure**

### **A. Traffic Light**

The PARTIES agree that a traffic control device, i.e. a traffic light, shall be constructed at the intersection of Sixth Ave. and Juan Sanchez Blvd. in San Luis, Arizona and the PARTIES shall share in the cost. The CITY shall cause the design, construction, and installation of the traffic control device during fiscal year 2018/2019 and shall pay for seventy five percent (75%) of the cost and DISTRICT shall pay twenty-five percent (25%) of the cost. The cost to the DISTRICT will not exceed \$100,000. CITY agrees to give at least thirty days advance notice of intent to install said traffic control device no later than April 1, 2018

### **B. Deceleration Lane**

The PARTIES agree that as an appropriate public safety requirement for the safety of those using or visiting the facilities of the DISTRICT either for Ed Pastor Elementary School or the District Administration Building, a deceleration and stacking lane on the east side of Sixth Ave. by the property of DISTRICT needs to be developed. DISTRICT agrees to design and construct said deceleration and stacking lane. The target date to develop and construct said infrastructure (“infrastructure”) shall be during the summer of 2017, and starting immediately upon full execution of this AGREEMENT but it shall be developed and completed no later than January 1, 2018

### **C. Temporary Certificate of Occupancy**

The development of the infrastructure (“infrastructure”) called for herein was a requirement for a certificate of occupancy for the District Administration Building. Upon execution of this intergovernmental AGREEMENT, CITY agrees to immediately issue a temporary certificate of occupancy conditioned upon the development of the infrastructure (“infrastructure”) as stated in this AGREEMENT and such other conditions as may be appropriate pursuant to the Building Codes of the CITY as determined by the Building Official.

## **Section 7. General Terms and Conditions**

A. Notice: Notices or other communications to the CITY regarding this AGREEMENT shall be either delivered personally by process service or sent by registered or certified mail, postage prepaid, addressed to:

If to CITY: Tadeo A. De La Hoya, City Manager  
1090 East Union Street (personal service)  
P.O. Box 1170 (by registered or certified mail)  
San Luis, Arizona 85349

If to DISTRICT: Dr. Raymond Aguilera Superintendent  
Gadsden Elementary School District #32  
1453 N. Main Street, San Luis, AZ 85349

or such other addresses as either PARTY may from time to time designate in writing and deliver in a like manner. Any such change of address notice shall be given at least ten (10) days before the date on which the change is to become effective.

B. Non-Discrimination Requirements: The PARTIES shall comply with State Executive Order #2009-09, which mandates that all persons, regardless of race, color, religion, sex, national origin or political affiliation, shall have equal access to employment opportunities, and all other applicable federal and state laws, rules and regulations, including Title VI, and all other federal and state employment and educational opportunity laws, rules and regulations, including Title VII of the Civil Rights Act of 1964, P.L. 88-854 (1964), and the Americans with Disabilities Act of 1999.

C. The PARTIES by their signatures below warrant and certify that they have reviewed A.R.S. Section 15-512 including but not limited to sub-paragraph H and further warrant that each and all of their employees, subcontractors and those for whom they have directed and direct responsibility, shall comply and cause any employee, subcontractor or employee of subcontractor or others for whom they are responsible (hereinafter "agents") to comply with A.R.S. Section 15-512. All PARTIES, subcontractors and agents shall each obtain and possess a valid fingerprint clearance card pursuant to Title 41, Chapter 12, Article 3.1 of the Arizona Revised Code prior to coming on to DISTRICT property and failure to do so shall be a substantial breach of this AGREEMENT.

D. Employment Eligibility: The PARTIES warrant, and shall require their subcontractors to warrant, that each is in compliance with all federal immigration laws and regulations that relate to their employees and with A.R.S. § 23-214 relating to verification of employment eligibility. A breach of this warranty shall be deemed a material breach of the AGREEMENT and is subject to penalties up to and including termination of this AGREEMENT. Each PARTY retains the legal right to inspect the papers of the other PARTY's employee or subcontractor employee who works on this AGREEMENT to ensure that the PARTY or its subcontractors are complying with this warranty. Employees hired by either PARTY to provide services, whether providing those services on premises owned by the CITY or the DISTRICT, shall be the employee of the hiring PARTY only.

E. Costs and Attorney Fees: In the event any action, suit, or proceeding is brought for failure to observe any of the terms, covenants, or provisions of this AGREEMENT, the prevailing PARTY shall be entitled to recover as part of such action or proceeding, all

litigation and collection expenses, including, but not limited to, witness fees, court costs, and reasonable attorney's fees.

F. Assignments and Successors: Neither PARTY shall assign its rights, nor delegate its duties, or otherwise dispose of any right, title, or interest in all or any part of this AGREEMENT, or assign any monies due or payable hereunder without the prior written consent of the other PARTY. Such consent shall not be unreasonably withheld.

G. Entire AGREEMENT: This AGREEMENT contains the entire AGREEMENT between the PARTIES, and no oral or written statement, promises, or inducements made by either PARTY or agent of either PARTY that is not contained in this written AGREEMENT or specifically referred to in this written AGREEMENT shall be valid or binding. This AGREEMENT may not be enlarged, modified, or altered except in writing signed by the PARTIES and endorsed herein.

H. Conflicts of Interests Provisions: This AGREEMENT is subject to the conflict of interest provisions of A.R.S. §38-511.

I. Venue: The PARTIES must initiate and maintain any mediation, arbitration, legal actions or other judicial proceedings arising from this AGREEMENT in a court of competent jurisdiction in Yuma County, Arizona.

J. Construction: Headings are solely for the PARTIES' convenience, are not a part of this AGREEMENT, and shall not be used to interpret this AGREEMENT. This AGREEMENT shall not be construed as if it had been prepared by one of the PARTIES, but rather as if both PARTIES have prepared it.

K. Counterparts: This AGREEMENT may be executed in multiple counterparts, each of which shall constitute one and the same instrument.

L. Governing Law: The laws of the State of Arizona govern this AGREEMENT as to validity, interpretation, and performance.

M. Independent entities: DISTRICT and CITY are independent entities and contractors. Nothing in this AGREEMENT shall be deemed to constitute a partnership or joint venture between the PARTIES or constitute any PARTY or its agent, representative, or employee to be the agent, representative, or employee of the other PARTY for any purpose. Employees of the DISTRICT and the CITY shall not be personally liable under this AGREEMENT.

N. Waiver. No delay in exercising any right or remedy shall constitute a waiver thereof, and no waiver by the PARTIES of the breach of any provision of this AGREEMENT shall be construed as a waiver of any preceding or succeeding breach of the same or of any other provision of this AGREEMENT.

O. Amendment of the AGREEMENT. This AGREEMENT may be amended, in whole or in part and with respect to all or any portion of the Property, only with the mutual written consent of the PARTIES to this AGREEMENT.

P. Severability. If any other provision of the AGREEMENT is declared void or unenforceable, such provision shall be severed from this AGREEMENT, which shall otherwise remain in full force and effect.

Q. Time is of the essence.

DATED this \_\_\_\_\_ day of \_\_\_\_\_, 2017

CITY OF SAN LUIS,  
a municipal corporation

GADSDEN ELEMENTARY SCHOOL  
DISTRICT #32

By \_\_\_\_\_  
Gerardo Sanchez  
Mayor

By \_\_\_\_\_  
Dr. Raymond Aguilera  
Superintendent

APPROVED AS TO FORM:

APPROVED TO AS FORM:

By \_\_\_\_\_  
City Attorney

By \_\_\_\_\_  
YUHSD Attorney

ATTEST:

\_\_\_\_\_  
City Clerk

I hereby state that I am an attorney for the City of San Luis, State of Arizona, and pursuant to the provisions of A.R.S. 11-952(D) have determined that the foregoing agreement is in proper form and is within the powers and authority granted to the City of San Luis, Arizona under the laws of the State of Arizona.

I hereby state that I am an attorney for Gadsden Elementary School District #32 (District), State of Arizona, and pursuant to the provisions of A.R.S. 11-952(D) have determined that the foregoing agreement is in proper form and is within the powers and authority granted to District under the laws of the State of Arizona.

Dated this \_\_\_\_ day of \_\_\_\_\_,  
2017

Dated this \_\_\_\_ day of \_\_\_\_\_,  
2017

By \_\_\_\_\_  
City Attorney

By \_\_\_\_\_  
District Attorney