

PURPOSE:

To provide guidelines to departments on how to develop organization charts to facilitate better understanding of the information presented.

POLICY:

- I. In order to facilitate mutual understanding of information presented on Organization Charts, it is desirable to use uniform standards in their development. Some basic generalities are listed below. Deviations from these may be appropriate when following these guidelines does not provide the most accurate or meaningful information. The value of standardization becomes more apparent if we consider the purpose of the organizational chart: to clarify and communicate organizational structure, reporting relationships and assignment of positions within an organization.
  - A. Good balance or symmetry is desirable, but not at the cost of clarity or accuracy.
  - B. In large organizations it is desirable to establish a basic chart to show the overall structure of the department or organization. Supplementary charts may show details at lower levels. The amount of detail appropriate for a particular chart will depend on the purpose for which it is prepared.
  - C. As major classification studies are undertaken, new master organization charts should be produced, which may be amended from time to time after that date.
  - D. The majority of organizational charts will be designed to indicate the assignment of positions.
  - E. When a chart is prepared for a classification study, be certain to show the next higher level of position within the organizational unit and whether or not the next higher level supervises other positions.
  - F. If a position shown on the organization chart has other areas of responsibility not shown on the chart, a double ended horizontal arrow may be used to indicate other areas of responsibility.
  - G. In preparing organizational charts, it is a good idea to allow room for positions to be added in the future. As positions are added to the chart or reclassified in the future, the date of change should be included next to the position studied. An asterisk may be used to aid in showing areas of change.
  - H. Identification of the functional responsibility of small units can be helpful to others in the future and, therefore, should be included if possible.
  - I. It is also possible that in some instances it may be desirable to add other information concerning the unit on the organization chart.
  - J. Solid lines are used to indicate direct control or flow of authority downward and reporting relationships upward. In some instances it may be appropriate to use a broken line with a brief notation to indicate an advisory or cooperative relationship.

- K. Organization charts should be dated and show the developer's initials. Changes should be initialed as well as dated.

PROCEDURE:

- I. Departments are required to submit updated accurate organizational charts each year with the budget request to the County Administrative Office.
- II. Upon CAO approval, a copy will be forwarded to the Personnel Department.
- III. New positions requested should be clearly labeled as such so that 1) the Personnel Department can easily identify new positions requested to compare to those approved (for classification purposes); and, 2) the chart can be easily updated after the budget is finalized.
- IV. The Personnel Department will compile and publish the organization charts provided.