



# MULTNOMAH COUNTY AGENDA PLACEMENT REQUEST BUDGET MODIFICATION

(revised 03/25/11)

## Board Clerk Use Only

Meeting Date:	4/12/12
Agenda Item #:	R.5
Est. Start Time:	11:20 am
Date Submitted:	3/29/12

## BUDGET MODIFICATION: Countywide-02

**Agenda Title:** BUDGET MODIFICATION CW-02 - Finance Study Phase 1 – Classification  
Only Study for Represented Positions in 5 Classifications Countywide

*Note: For all other submissions (i.e. Notices of Intent, Ordinances, Resolutions, Orders or Proclamations) please use the APR short form.*

Requested Meeting Date:	April 12, 2012	Amount of Time Needed:	10 minutes
Department:	County Management	Division:	HR Class Comp
Contact(s):	John Kaneski – Class Comp;		
Phone:	(503) 988-5015	Ext.	22342
	I/O Address:		
Presenter Name(s) & Title(s):	Travis Graves and/or invited others		

## General Information

### 1. What action are you requesting from the Board?

To approve the final recommended classifications for approximately 111 positions throughout the County studied by Class Comp (as well as the recommended pay grade changes outlined in #3). The study known as the Finance Study – Phase 1 (Represented Classifications), was completed in February 2012 and became effective on February 21, 2012.

### 2. Please provide sufficient background information for the Board and the public to understand this issue. Please note which Program Offer this action affects and how it impacts the results.

The represented Finance classification series (Finance Technician through Finance Specialist Senior) and the represented Budget Analyst classification had a compensation review completed in 2011 under the new Local 88 agreement to bargain wages for agreed-upon job classes. As a part of this compensation review process, these five finance class specifications were updated in August/September 2010. As a result of the wage bargaining process, the pay grades for two of the classifications increased (Finance Specialist 1 and Finance Specialist 2), effective July 1, 2011, and the pay grades of the other three classes remained the same. Therefore, reviewing compensation and

pay grades was not a part of this study's focus.

The scope of this management-sponsored project was a classification-only study in order to review the current represented finance classifications, update and revise the class specifications if needed (without conducting a labor market compensation review/evaluation), and allocate the positions in the study to the appropriate job classifications. This study was conducted for specified AFSCME finance positions allocated to the classifications of:

- Finance Technician
- Finance Specialist 1
- Finance Specialist 2
- Finance Specialist Senior
- Budget Analyst

The majority of these classifications are utilized in the Department of County Management (31%), Health Department (23%) and in the Department of County Human Services (15%). However, these classifications are also found in other departments throughout the County, including: Community Services; Community Justice; County Assets; Library; District Attorney's Office; and Sheriff's Office. These broad classifications encompass functions which have varying accounting/fiscal work assignments in diverse programs.

After considerable review of the position descriptions and information obtained from desk interviews, employees, managers, and the finance management advisory panel, the Class Comp team determined that the current finance classification structure remains effective and successful. Broad classifications and the existing progression are working well -- they offer greater flexibility in assigning work and provide for better overall cross training and employee development opportunities. Therefore, the existing Budget Analyst, Finance Specialist Senior, Finance Specialist 2, Finance Specialist 1 and Finance Technician classifications were maintained.

For more detailed information please see the attached study.

### **3. Explain the fiscal impact (current year and ongoing)**

Of 111 positions studied, 3.6% changed to job classes with higher pay grades; 1.8% changed to job classes with the same pay grade; and no positions were allocated to classifications with lower pay grades. Approximately 95% of the Finance positions studied remained unchanged (i.e., it was determined that they were appropriately classified).

The following details the cost increases by program:

Finance & Risk-Treasury (702447 – DCM) reclassification of a 1.00 Finance Specialist 2 to Finance Specialist, Senior for an annual increase of \$2,455 (note the budget modification only addresses the budget increase for the final third of the year, \$810).

Facilities & Property Management (701387 - DCM) reclassification of a 1.00 Finance Specialist 2 to Budget Analyst for an annual increase of \$6,750 (note the budget modification only addresses the budget increase for the final third of the year, \$2,227).

Finance & Human Resources (713013 – DA) reclassification of a 1.00 Finance Technician to Finance Specialist 1 for an annual increase of \$1,206.

Business Services-Accounts Payable (703090 – HD) reclassification of a 1.00 Finance Technician to Finance Specialist 1 (no fiscal impact since the incumbent’s current pay is within the new pay grade).

Business Services-Fiscal (703538 – MCSO) reclassification of a 1.00 Finance Specialist, Senior to Budget Analyst (no fiscal impact since both classifications are at the same pay grade).

Accounting (709701 – DCHS) reclassification of a 1.00 Finance Specialist, Senior to Budget Analyst (no fiscal impact since both classifications are at the same pay grade).

**4. Explain any legal and/or policy issues involved.**

Multnomah County Personnel Rule 5-50, in essence, states that employees and all positions should be properly classified. Further, Central Human Resources is responsible maintaining a pay and classification system, and for reviewing positions whenever the duties change substantially. Central Human Resources also classifies and reclassifies all regular and limited duration positions to approved classifications based on an analysis of duties, responsibilities, knowledge, skills, abilities, and qualifications. Multnomah County Personnel Rule 5-45 provides the foundation for Central HR to create and maintain an appropriate salary structure to facilitate recruitment, retain competent employees with necessary skills/talents, and to establish equitable internal and external pay relationships. With the periodic review of classifications and pay integrity for work performed, the County will maintain public trust in its financial stewardship.

**5. Explain any citizen and/or other government participation that has or will take place.**

All employees and their salaries are published annually.

## ATTACHMENT A

### Budget Modification

If the request is a **Budget Modification**, please answer all of the following in detail:

- **What revenue is being changed and why? If the revenue is from a federal source, please list the Catalog of Federal Assistance Number (CFDA).**  
Not applicable
- **What budgets are increased/decreased?**  
The Risk Fund is increased by \$257.
- **What do the changes accomplish?**  
The reclassifications implement the Finance Study Phase 1 recommendations.
- **Do any personnel actions result from this budget modification? Explain.**  
There are no changes in full time equivalents; however, there are changes in classifications.
- **If a grant, is 100% of the central and department indirect recovered? If not, please explain why.**  
Not applicable
- **Is the revenue one-time-only in nature? Will the function be ongoing? What plans are in place to identify a sufficient ongoing funding stream?**  
Not applicable

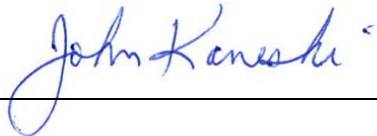
- **If a grant, what period does the grant cover? When the grant expires, what are funding plans? Are there any particular stipulations required by the grant (i.e. cash match, in kind match, reporting requirements etc)?**  
Not applicable

*NOTE: If a Budget Modification or a Contingency Request attach a Budget Modification Expense & Revenues Worksheet and/or a Budget Modification Personnel Worksheet.*

## ATTACHMENT B

BUDGET MODIFICATION: Countywide -02

### Required Signatures

Elected Official or Department/ Agency Director:	Karyne Kieta /s/	Date:	3/29/12
Budget Analyst:	Christian Elkin /s/	Date:	3/28/12
Department HR:	Travis Graves /s/	Date:	3/28/12
Countywide HR:		Date:	3/27/2012