



MULTNOMAH COUNTY AGENDA PLACEMENT REQUEST BUDGET MODIFICATION

(Revised: 09/23/13)

APPROVED: MULTNOMAH COUNTY
BOARD OF COMMISSIONERS

AGENDA # C-2 DATE 5/22/14
MARINA BAKER, ASST BOARD CLERK

Board Clerk Use Only

Meeting Date: 5/22/14
Agenda Item #: C.2
Est. Start Time: 10:15 am
Date Submitted: 5/12/14

**BUDGET MODIFICATION DCM-13 Reclassifying Office Assistant Senior (Rep)
Agenda Title: to Office Assistant Senior (NR) as determined by Central Human Resources
Classification Compensation unit.**

Note: if Contingency, use that form. If item other than a BudMod, please use different APR. : Title should not be more than 2 lines but sufficient to describe the action requested.

Requested Meeting Date: _____ Time Needed: Consent
Department: County Management Division: Human Resources
Contact(s): Shaun Coldwell
Phone: 988-8285 Ext. 88285 I/O Address: 503/4
Presenter Name(s) & Title(s): N/A

General Information

1. What action are you requesting from the Board?

The department is requesting Board approval of budget modification DCM-13 reclassifying Office Assistant Senior (Rep) to Office Assistant Senior (NR).

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.

This modification reflects a Class/Comp decision on classification request 2441 initiated by management as a result of confidential duties related to collective bargaining that is now assigned. The position will be responsible for reception and administrative support for Benefits and Wellness, including collecting, reviewing, and preparing data and information related to collective bargaining.

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

Minimal as job classifications are similar, and overlap.

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

N/A

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

N/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).

N/A

- What budgets are increased/decreased?

N/A

- What do the changes accomplish?

Approval of classification decision from Central Human Resources Classification Compensation unit that best reflects the duties of the position.

- Do any personnel actions result from this budget modification? Explain.

Yes, reclassification of position from Office Assistant Senior (rep) to Office Assistant Sr. (NR).

- If a grant, is 100% of the central and department indirect recovered? If not, please explain why.

N/A

- 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?

N/A

- 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)?

N/A

NOTE: Attach a Budget Modification Expense & Revenues Worksheet and/or a Budget Modification Personnel Worksheet.

Required Signatures

Elected Official Karyne Kieta 5/13/14
or Dept Director: _____ Date: _____

Budget Analyst: Ching Hay 5/13/14
_____ Date: _____

Note: Please submit electronically. Insert names of your approvers followed by /s/ - we no longer use actual signatures. Please date each signature. Use "n/a" when signature not applicable."

Budget Modification ID: **DCM 13****EXPENDITURES & REVENUES**

Please show an increase in revenue as a negative value and a decrease as a positive value for consistency with SAP.

Budget/Fiscal Year: 2014

Line No.	Fund Center	Fund Code	Program #	Func. Area	Internal Order	Accounting Unit		Cost Element	Current Amount	Revised Amount	Change Increase/ (Decrease)	Subtotal	Description
						Cost Center	WBS Element						
1	78-00	3500	72020	20		705200		60000	195,989	195,989	0		OA Sr (REP) to OA Sr (NR) for Posn 703958
2	78-00	3500	72020	20		705200		60130	66,185	66,185	0		OA Sr (REP) to OA Sr (NR) for Posn 703958
3	78-00	3500	72020	20		705200		60140	57,155	57,155	0		OA Sr (REP) to OA Sr (NR) for Posn 703958
4	78-00	3500	72020	20		705200		60170	65,000	65,000	0		OA Sr (REP) to OA Sr (NR) for Posn 703958
5										0			
6	72-80	3500	72020	20		705210		50316	(62,910,980)	(62,910,980)	0		Svc Reim to Risk
7	72-80	3500	72020	20		705210		60330	1,020,899	1,020,899	0		Claims Paid
8										0			
9										0			
10										0			
11										0			
12										0			
13										0			
14										0			
15										0			
16										0			
17										0			
18										0			
19										0			
20										0			
21										0			
22										0			
23										0			
24										0			
25										0			
26										0			
27										0			
28										0			
29										0			
										0	0		Total - Page 1
										0	0		GRAND TOTAL

ANNUALIZED PERSONNEL CHANGE

Change on a full year basis even though this action affects only a part of the fiscal year (FY).

							ANNUALIZED			
Fund	Job #	HR Org	CC/WBS/IO	Position Title	Position Number	FTE	BASE PAY	FRINGE	INSUR	TOTAL
3500	6002	61279	705200	OFFICE ASSISTANT SR (REP)	703958	(1.00)	(45,310)	(15,859)	(12,234)	(73,403)
3500	9636	61279	705200	OFFICE ASSISTANT SR (NR)	703958	1.00	45,310	15,859	12,234	73,403
										0
										0
										0
										0
										0
										0
										0
										0
										0
										0
										0
										0
										0
										0
										0
										0
TOTAL ANNUALIZED CHANGES						0.00	0	0	0	0

CURRENT YEAR PERSONNEL DOLLAR CHANGE

Calculate costs/savings that will take place in this FY; these should explain the actual dollar amounts being changed by this Bud Mod.

							CURRENT YEAR			
Fund	Job #	HR Org	CC/WBS/IO	Position Title	Position Number	FTE	BASE PAY	FRINGE	INSUR	TOTAL
3500	6002	61279	705200	OFFICE ASSISTANT SR (REP)	703958	(0.33)	(11,328)	(3,965)	(3,059)	(18,351)
3500	9636	61279	705200	OFFICE ASSISTANT SR (NR)	703958	0.33	11,328	3,965	3,059	18,351
										0
										0
										0
										0
										0
										0
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										0
										0
TOTAL CURRENT FY CHANGES						0.00	0	0	0	0

FM Side			PS/CO Side			Cost Element/Commitment Item	Notes
FM Fund Center	FM Fund Code	Functional Area	Internal Order	Cost Center	WBS Element		
General Fund Contingency				9500001000		60470	Reduce available General Fund Contingency
19	1000	0020		xxx	xxx	xxxxx	Increase Expenditure
xx-xx	xxxxx	0020					
Indirect Central							
xx-xx	xxxxx				xxx	60350	Indirect Expenditure
19	1000	0020		9500001000		50310	Indirect reimbursement revenue in General Fund
19	1000	0020		9500001000		60470	CGF Contingency expenditure
Departmental							
xxx	xxxxx			xxx	xxx	60355	Indirect Department Expenditure
xx-xx	1000			xxx	xxx	50370	Indirect Dept reimbursement revenue in General Fund
xx-xx	1000			xxx	xxx	xxx	Off setting Dept expenditure in General Fund
Telecommunications							
xx-xx	xxxxx				xxx	60370	Departmental telecommunication expenditure
78-70	3503	0020		709525		50310	Budgets receipt of reimbursement
78-70	3503	0020		709525		60200	Budgets offsetting expenditure in telecommunications fund
Data Processing							
xx-xx	xxxxx				xxx	60380	Departmental data processing expenditures
78-70	3503	0020		709000		50310	Budgets receipt of Data Processing reimbursement
78-70	3503	0020		709000		60240	Budgets offsetting expenditures
Electronic Service Reimbursement							
xx-xx	xxxxx					60420	Departmental Electronics expenditure
78-60	3501	0020		904200		50310	Receipt of Electronics service reimbursement
78-60	3501	0020		904200		60240	Budgets offsetting expenditure
Motor Pool: Use this cost center if you are adding funds for motor pool use.							
xx-xx	xxxxx				xxx	60410	Departmental Motor Pool expenditure
78-30	3501	0020		904150		50310	Budgets receipt of Motor Pool service reimbursement
78-30	3501	0020		904150		60240	Budgets offsetting expenditure
Fleet: Use this cost center if you are adding funds for dedicated program cars.							
xx-xx	xxxxx				xxx	60410	Departmental Fleet expenditure
78-60	3501	0020		904100		50310	Budgets receipt of Fleet service reimbursement
78-60	3501	0020		904100		60240	Budgets offsetting expenditure
Building Management							
xx-xx	xxxxx				xxx	60430	Departmental Building Management expenditure
78-50	3505	0020		902575		50310	Budgets receipt of Building Management service reimbursement
78-50	3505	0020		902575		60170	Budgets offsetting expenditure
Insurance Service Reimbursement							
xx-xx	xxxxx					60140 or 60145	Departmental insurance expenditure
72-80	3500	0020		705210		50316	Insurance Revenue
72-80	3500	0020		705210		60330	Offsetting expenditure
Lease Payments to Capital Lease Retirement Fund							
xx-xx	xxxxx					60450	Departmental Capital Lease Retirement expenditure Contact your Budget Analyst to complete this.
Mail & Distribution							
xx-xx	xxxxx				xxx	60460	Mail & Distribution expenditure
78-20	3504	0020		904400		50310	Budgets receipt of service reimbursement
78-20	3504	0020		904400		60230	Budgets offsetting expenditure
Records							
xx-xx	xxxxx				xxx	60460	Records expenditure
78-20	3504	0020		904500		50310	Budgets receipt of service reimbursement
78-20	3504	0020		904500		60240	Budgets offsetting expenditure

How are functional areas assigned to cost objects?

For the most part, functional area is related to what department has recorded the revenue or expenditure (i.e. the District Attorney is reported in Public Safety and Justice). There are some exceptions to this rule that require certain funds to be assigned to a particular functional area, regardless of what department the revenues or expenditures are recorded in.

Functional Area Assignments ~ Based on Fund		
Special Revenue Funds		
1501 - Road Fund	Road & Bridges	0080
1502 - Emergency Communications Fund	Community Services	0060
1503 - Bike Path Fund	Community Services	0060
1504 - Recreation Fund	Community Services	0060
1506 - County School Fund	Community Services	0060
1508 - Animal Control Fund	Community Services	0060
1509 - Willamette River Bridges Fund	Roads & Bridges	0080
1510 - Library Fund	Library	0070
1512 - Land Corner Preservation Fund	Roads & Bridges	0080
1518 - Oregon Historical Society Special Levy	Community Services	0060
1519 - Video Lottery	Community Services	0060
Capital Project Funds		
2504 - Building Project Fund	Community Services	0060
2507 - Capital Improvement Fund	Community Services	0060
2508 - Asset Acquisition Fund	Community Services	0060
2509 - Asset Preservation Fund	Community Services	0060
2511 - Sellwood Bridge Replacement	Roads & Bridges	0080
Enterprise Funds		
3000 - Dunthorpe-Riverdale Svc Dist #14 Fund	Dunthorpe-Riverdale Svc Dist #14	0500
3001 - Mid County Svc Dist #1 Fund	Mid County Svc Dist #1	0510
3002 - Behavioral Health Managed Care Fund	Behavioral Health Managed Care	0520

If a cost object is not in one of the funds listed above, then the functional area should be assigned based on the department that the cost object is in.

Functional Area Assignments ~ Based on Department (Fund Center)		
Non-Dept (10, except 10-50)	General Government	0020
Non-Dept CCFC (10-50)	Social Services	0040
District Attorney (15)	Public Safety & Justice	0050
Countywide (18 & 19)	General Government	0020
Human Services (20, 21, 25, 26, 30 & 31)	Social Services	0040
Health (40)	Health Services	0030
Community Justice (50)	Public Safety & Justice	0050
Sheriff's Office (60)	Public Safety & Justice	0050
County Management (72)	General Government	0020
County Assets (78)	General Government	0020
Library (80)	Library	0070
Community Services (91)	General Government	0020

If you have any questions or comments, please contact Susan Luce in General Ledger at ext. 22138.



Department of County Management
MULTNOMAH COUNTY OREGON
Human Resources
Multnomah Building
501 SE Hawthorne, Suite 300
Portland, Oregon 97214

Date: 03/07/2014
To: Tami Mahrt, HR Manager 1
From: Susan Mullett, Classification and Compensation Unit (503/3/300) *Susan Mullett*
Request #: 2441
Position Number: 703958

We have completed our review of your request and the decision is outlined below.

Request Information:

Date Received: 02/28/2014	Effective Date: 03/05/2014
Current Classification: Office Assistant Senior (Rep)	Allocated Classification: Office Assistant Senior (NR)
Job Class Number: 6002	Job Class Number: 9636
Pay Grade: 24	Pay Grade: 115
	Pay Range \$34,341.84 --\$48,078.96

Position Information:

- ☒ Represented
- ☒ Vacant - see New/Vacant Section

New/Vacant Position Information:

If the position is vacant or the incumbent is not reclassified with the position, the position must be filled in accordance with the normal appointment procedures. If the position is reclassified due to reorganization, a limited recruitment process may be conducted. Please consult your Department Human Resources Unit for assistance.

Reason for Classification Decision:

This vacant position in the Employee Benefits office is submitted for reclassification from an Office Assistant Senior (Rep) to Office Assistant Senior (NR) as a result of the confidential duties related to collective bargaining that is now assigned. Duties include reception and administrative support for Benefits and Wellness; reports and payment processing; supplies ordering; administering the TriMet Bus Pass program; and records filing. In addition, this position will provide ongoing administrative support, including collecting, reviewing, and preparing data and information related to collective bargaining. In addition, this position will attend and participate in meetings related to bargaining activities. Minimum qualifications include the equivalent to the completion of the twelfth grade and three (3) years of specialized, increasingly responsible clerical experience in employee benefits or related field.

An analysis of the Office Assistant Senior Rep (6002), and Office Assistant Senior NR (9636) classifications was performed before making an allocation decision:

The *Office Assistant Senior (6002)* classification performs a wide variety of responsible and difficult administrative work in support of the function, unit, or program to which assigned. Incumbents primarily perform such tasks as: applying departmental policies and procedures in performing advanced administrative work, including the maintenance of detailed records, verifying the accuracy of information, researching discrepancies; assisting the public and other staff/agencies in interpreting, explaining, and applying policies, procedures, laws, and ordinances; researching, analyzing, and summarizing data for special projects and comprehensive statistical, numeric, and financial reports; developing, updating, and maintaining standardized operating procedures, forms, report formats, rules, and regulations; maintaining a variety of statistical records; reviewing, computing, and correcting data requiring the analysis and coordination of several data sources and interpretation of policy. In addition, this class may direct the work activities of assigned clerical personnel; prioritize and coordinate work assignments; review work for

accuracy; evaluate operations and activities of assigned responsibility area; recommend organizational or procedural improvements or modifications; and prepare reports on operations and activities. Incumbents exercise independent judgment in scheduling and accomplishing work, handling difficult human relations situations, analyzing alternatives, maintaining complex systems, carrying out research and analysis of varied data, and originating reports. Minimum qualifications include the equivalent to the completion of the twelfth grade and three (3) years of specialized, increasingly responsible clerical experience in the area of assignment.

The *Office Assistant Senior NR (9636)* classification performs a wide variety of responsible and difficult administrative work in support of the function, unit, or program to which assigned. Incumbents primarily perform such tasks as: applying departmental policies and procedures in performing advanced administrative work, including the maintenance of detailed records, verifying the accuracy of information, researching discrepancies; assisting the public and other staff/agencies in interpreting, explaining, and applying policies, procedures, laws, and ordinances; researching, analyzing, and summarizing data for special projects and comprehensive statistical, numeric, and financial reports; developing, updating, and maintaining standardized operating procedures, forms, report formats, rules, and regulations; maintaining a variety of statistical records; reviewing, computing, and correcting data requiring the analysis and coordination of several data sources and interpretation of policy. In addition, this class may direct the work activities of assigned clerical personnel; prioritize and coordinate work assignments; review work for accuracy; evaluate operations and activities of assigned responsibility area; recommend organizational or procedural improvements or modifications; and prepare reports on operations and activities. The Office Assistant Senior NR is management/confidential as defined by Oregon's Public Employees Collective Bargaining Act, or in accordance with the terms of the AFSCME Local 88 Collective Bargaining Agreement. This position will perform confidential tasks, including collecting, compiling and editing data and information, directly related to grievance handling and/or collective bargaining. Minimum qualifications include the equivalent to the completion of the twelfth grade and three (3) years of specialized, increasingly responsible clerical experience in the area of assignment. This classification is a good match due to the administrative support duties that provide handling and compiling data and information for collective bargaining purposes.

The duties, responsibilities and qualifications support this position is allocated to *Office Assistant Senior NR (9636)*

Rules and Rights:

This classification decision is subject to all applicable requirements stated in Multnomah County Personnel Rule 5-50 including the provision that Central HR may re-evaluate the classification decision up to one year from the date of issue to ensure duties and work are being carried out as originally described. This allocation may require Board of County Commissioners' approval, and so this decision is considered preliminary until such approval is received.

Previously approved specialized KSAs for a position do not transfer with a reclassification.

If you have any questions, please feel free to contact me at 503-988-3241.

Cc Dorian Gualotunia, HR Analyst, Sr.
 Karin Lamberton, HR Analyst Sr.
 Jacqueline Burns, HR Maintainer

Susan Giesbrecht, HR Analyst Sr.
Leola Warner, HR Maintainer
Class Comp File