



# Multnomah County Agenda Placement Request Budget Modification

(Revised 9/23/13)

APPROVED: MULTNOMAH COUNTY

BOARD OF COMMISSIONERS

AGENDA # C-9 DATE 8/18/16

MARINA BAKER, ASST BOARD CLERK

## Board Clerk Use Only

Meeting Date: 8/18/16

Agenda Item #: C.9

Est. Start Time: 9:30 am

Date Submitted: 8/2/16

Agenda Title: **BUDGET MODIFICATION # DCA-02-17: Reclassify Program Specialist to Data Analyst Sr in DCA Records Management**

Requested Meeting Date: August 18, 2016

Time Needed: Consent Agenda

Department: 78 - County Assets

Division: Records Management

Contact(s): Lisa Whedon & Deirdre Mahoney-Clark

Phone: 503-988-7580

Ext. 87580

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 of County Assets is requesting Board Approval of budget modification DCA-02-17 reclassifying a Program Specialist (Job Class # 6021) to Data Analyst Senior (Job Class # 6456). Position # 715585 in Program Offer 78404-17 Class Comp Letter #3460.

### 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 management-sponsored request in the Records Management Division of the Department of County Assets is for reclassification of a filled position from a Program Specialist to a Data Analyst Senior.

Implementation of an electronic document and records management system (EDRMS) resulted in this position gradually assuming different, and higher level duties and responsibilities since June of 2015.

The position is responsible for serving as the administrator of the Electronic Document and Records Management System (EDRMS) including system development, user account maintenance, data classification and organization, and template development for record objects; serving as the project manager for on-boarding and upgrading user accounts, including customization of data entry templates and training of system users; pulling data in from networked servers and from extracts from other information systems and databases; developing and

analyzing metrics using EDRMS data to support program objectives, to advise customers, and for budgetary and financial purposes; developing reports and studies using EDRMS data to support program staff and management; developing and maintaining custom reports for programs and end users; providing technical assistance and troubleshooting for system users, including escalation to software vendor when necessary; serving as the liaison between customers and IT.

An analysis of the Program Specialist, Data Analyst, and Data Analyst Senior classifications was performed before making an allocation decision: The duties, responsibilities and qualifications support that this position is allocated to Data Analyst Senior. (6456).

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

Personnel expenses are expected to increase \$5,623.

The current top step of the new classification is 22.9% higher than the top step of the original position.

In subsequent fiscal years, the reclassified position will be subject to approved cost of living adjustments and merit increase. The financial impact of the new classification will be funded within the ongoing department's budget

As a result of the increase in personnel cost the Risk Management program offer 72020-17 will increase by \$295.

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

N/A

**5. Explain any citizen or other government participation.**

N/A

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**Budget Modification**

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**6. What revenue is being changed and why? If the revenue is from a federal source, please list the Catalog of Federal Assistance Number (CFDA).**

As a result of the increase in personnel cost the Risk Management program offer 72020-17 will increase by \$295.

**7. What budgets are increased/decreased?**

The personnel budget will increase \$5,623 with offsetting decrease in the Capital Equipment.

**8. What do the changes accomplish?**

Approval of this management sponsored classification request will best reflect the duties of the position.

**9. Do any personnel actions result from this budget modification?**

Yes, Program Specialist (Job Class # 6021) to Data Analyst Senior (Job Class # 6456). Position # 715585 in Program Offer 78404-17 (Class Comp Letter #3460)

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

N/A

**11. 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

12. 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 (e.g. cash match, in kind match, reporting requirements, etc)?

N/A

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Required Signature

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**Elected Official or** Sherry Swackhamer /s/  
**Dept. Director:**

**Date:** 7/28/16

**Budget Analyst:** Ching Hay /s/

**Date:** 8/2/16

**Department HR:** Prudence Veach /s/

**Date:** 7/28/16

**Countywide HR:** Karie Miller /s/

**Date:** 7/28/16

## Exp/Rev/FTE - Budget Modification

Budget Year: 2017

Budget Modification: DCA-02-17

### Expenditures & Revenues

An increase in revenue is shown as a negative value and a decrease as a positive value for consistency with SAP.

Line No.	Program Offer Number	Fund Code	Fund Center	Func. Area	Cost Object	Cost Element	Current Amount	Revised Amount	Change Increase/ (Decrease)	Subtotal
1	72020-17	3500	72-80	0020	705210	50316 - Svc Rmb Med/Dental	(77,647,811)	(77,648,106)	(295)	
2	72020-17	3500	72-80	0020	705210	60330 - Claims Paid	12,196,464	12,196,759	295	
3500 Total										0
72-80 Total										0
Program Offer Number 72020-17 Total										0
3	78404-17	3504	78-50	0020	904500	60000 - Permanent	302,115	306,191	4,076	
4	78404-17	3504	78-50	0020	904500	60130 - Salary Related Expns	101,992	103,244	1,252	
5	78404-17	3504	78-50	0020	904500	60140 - Insurance Benefits	99,909	100,204	295	
6	78404-17	3504	78-50	0020	904500	60550 - Capital Equipment	75,896	70,273	(5,623)	
3504 Total										0
78-50 Total										0
Program Offer Number 78404-17 Total										0

## Exp/Rev/FTE - Budget Modification

Budget Year: 2017

Budget Modification: DCA-02-17

### Annualized Personnel Changes

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

						Annualized				
Position Number	JCN	JCN Description	HR Org	Fund	Cost Object Number	FTE	Base Pay (60000)	Fringe (60130)	Insurance (60140)	Total
715585	6021	Program Specialist		3504	904500	(1.00)	(63,940)	(19,636)	(19,637)	(103,213)
715585	6456	Data Analyst/Sr		3504	904500	1.00	68,016	20,888	19,932	108,836
Total Annualized Changes:						0.00	\$4,076	\$1,252	\$295	\$5,623

### Current Year Personnel Changes

Cost/savings that will take place in this FY; these explain the actual dollar amounts being changed by this BudMod.

						Current Year				
Position Number	JCN	JCN Description	HR Org	Fund	Cost Object Number	FTE	Base Pay (60000)	Fringe (60130)	Insurance (60140)	Total
715585	6021	Program Specialist		3504	904500	(1.00)	(63,940)	(19,636)	(19,637)	(103,213)
715585	6456	Data Analyst/Sr		3504	904500	1.00	68,016	20,888	19,932	108,836
Total Current FY Changes:						0.00	\$4,076	\$1,252	\$295	\$5,623