



MULTNOMAH COUNTY AGENDA PLACEMENT REQUEST BUDGET MODIFICATION

(revised 08/02/10)

APPROVED: MULTNOMAH COUNTY
BOARD OF COMMISSIONERS
AGENDA # C-5 DATE 8/25/11
MARINA BAKER, ASST BOARD CLERK

Board Clerk Use Only

Meeting Date:	<u>8/25/11</u>
Agenda Item #:	<u>C.5</u>
Est. Start Time:	<u>9:30 am</u>
Date Submitted:	<u>8/10/11</u>

BUDGET MODIFICATION: DCHS12-07

Agenda Title:	BUDGET MODIFICATION DCHS12-07, reclassifying a current full-time Office Assistant 2 position to a Administrative Specialist position in the Developmental Disabilities division, as determined by the Class/Comp unit of Central Human Resources.
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Note: For all other submissions (i.e. Notices of Intent, Ordinances, Resolutions, Orders or Proclamations) please use the APR short form.

Requested Meeting Date:	<u>Next Available</u>	Amount of Time Needed:	<u>n/a</u>
Department:		Division:	<u>Developmental Disabilities</u>
Contact(s):	<u>Dana Lloyd</u>		
Phone:	<u>503-988-3691</u>	Ext.	<u>22377</u>
		I/O Address:	<u>167/240</u>
Presenter Name(s) & Title(s):	<u>Consent Agenda</u>		

General Information

1. What action are you requesting from the Board?

The Department of County Human Services (DCHS) recommends approval of budget modification DCHS12-07, reclassifying a full-time Office Assistant 2 position to an Administrative Specialist position in Developmental Disabilities Services Division (DDSD), as approved by the Class/Comp unit of Central Human Resources.

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 budget modification reflects an HR Class/Comp decision on a reclassification request initiated by the employee in Program Offer 25010 – DD Administration and Support.

This position is responsible for providing administrative support to the Developmental Disabilities Division senior management team. These duties involve maintaining executive management

appointment schedules and calendars with broad latitude and discretion in scheduling and rearranging managers' time, prioritizing appointments, and planning activities; planning and coordinating meetings, conferences and training; creating, proofreading and compiling reports, charts and other documents; responding to managers general inquiries of a sensitive nature or regarding department/division policies; revising policies, procedures, forms and other documents; and a variety of other office administrative support functions. Given the increased responsibilities HR Class/Comp has decided that the classification of Administrative Specialist best fits the duties and responsibilities of this position.

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

The pay scale for an Administrative Specialist is higher than that of an Office Assistant 2. As a result, this reclassification request will result in a current fiscal year increase in personnel costs of \$6,870. The budget for professional services in DDS D will be reduced by a like amount to offset the increase in personnel costs.

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

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).**

No revenue is being changed.

- **What budgets are increased/decreased?**

The overall budget impact for DDS D is neutral.

- **What do the changes accomplish?**

This budget modification will formally approve for FY12 the classification decision from Central Human Resources Class/Comp Unit #1750, to reclassify position 713687 from Office Assistant 2 to Administrative Specialist, which better reflects the functions and duties.

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

Yes. The approval of this budget modification will result in reclassifying of position 713687, a full-time position in DDS D from Office Assistant 2 to Administrative Specialist.

- **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: 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: DCHS12-07

Required Signatures

**Elected
Official or
Department/
Agency
Director:**

Dana C. Lloyd for Kathy Jinkle

Date:

8/8/11

Budget Analyst:

Patrick Heath

Date:

8/10/2011

Patrick Heath

**Department
HR:**

Urmila Jhattu

Date:

8/8/11

Urmila Jhattu

**Countywide
HR:**

John Kaneski

Date:

8/9/11

John Kaneski

Budget Modification ID: **DCHS12-07****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: 2012

Line No.	Fund Center	Fund Code	Program #	Func. Area	Accounting Unit			Cost Element	Current Amount	Revised Amount	Change Increase/ (Decrease)	Subtotal	Description
					Internal Order	Cost Center	WBS Element						
1	20-50	80001	25010	0040			DD10 ADM LA	60000		5,011	5,011		Permanent
2	20-50	80001	25010	0040			DD10 ADM LA	60130		1,459	1,459		Salary Related
3	20-50	80001	25010	0040			DD10 ADM LA	60140		401	401		Insurance Benefits
4	20-50	80001	25010	0040			DD10 ADM LA	60170		(6,871)	(6,871)		Professional Services
5													
6	72-10	3500		0020		705210		50310			(401)		Insurance Revenue
7	72-10	3500		0020		705210		60170			401		Offsetting expenditure
8													
9													
10													
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29													
											0	0	Total - Page 1
											0	0	GRAND TOTAL

Budget Modification: DCHS12-07

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
80001	6001	62953	DD ADM LA	Office Assistant 2	713687	(1.00)	(31,633)	(9,205)	(16,073)	(56,911)
80001	6005	62953	DD ADM LA	Adm Spec	713687	1.00	36,644	10,664	16,474	63,782
				TOTAL ANNUALIZED CHANGES		0.00	5,011	1,459	401	6,871

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.

Effective Date = 01-05-11

[illegible]



Department of County Management
MULTNOMAH COUNTY OREGON
Human Resources

Multnomah Building
501 SE Hawthorne, Suite 300
Portland, Oregon 97214
(503) 988-5015 Phone

To: Lee Burleson, Office Assistant 2 - DCHS
From: John Kaneski, Classification and Compensation Unit (503/3/300) *John Kaneski*
Date: July 18, 2011
Subject: Reclassification Request #1750 (Office Assistant 2 to Administrative Specialist)

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

Request Information:

Date Request Received: July 5, 2011	Position Number: 713687
Current Classification: Office Assistant 2	Requested Classification: Administrative Specialist
Job Class Number: 6001	Job Class Number: 6005
Pay Grade: 9	Pay Grade: 15

Request is: ☒ Approved as Requested Effective Date: January 5, 2011

Allocated Classification: Administrative Specialist	Job Class Number: 6005
Pay Range: \$36,644.40 - \$45,121.68 Annually	Pay Grade: 15

This classification decision is subject to all applicable requirements stated in MC 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. Further, this allocation may require Board of County Commissioners' approval, and so this decision is considered preliminary until such approval is received.

Position Information:

☒ Represented
☒ Filled & incumbent reclassified - see Employee Information Section

Employee Information:

Name of Incumbent Employee: Lee Burleson (SAP # 12264)
New Job Class Seniority Date: January 5, 2011

Date	Job Class and Number	Grade	Step	Rate	Action
January 4, 2011	Office Assistant 2 - 6001	9	2	\$15.15	Pre-reclass
January 5, 2011	Administrative Specialist - 6005	15	1	\$17.55	Post-reclass

Compensation will be determined in accordance with applicable bargaining agreement or MC Personnel Rule 2-40. Any compensation or seniority adjustments will be processed in accordance with applicable bargaining agreement or MC Personnel Rule 5-50 and 2-40.

Reason for Classification Decision:

Your position responsibilities now include providing administrative support to the Developmental Disabilities Services Division senior management team, including 2 Manager, Senior (executive-level) positions. These duties involve maintaining executive management appointment schedules and calendars with broad latitude and discretion in scheduling and rearranging managers' time, prioritizing appointments, and planning activities; planning and coordinating meetings, conferences and training; creating, proofreading and compiling reports, charts and other documents; responding for managers to general inquiries of a sensitive nature or regarding department/division policies; revising policies, procedures, forms and other documents; and a variety of other office administrative support functions.

Office Assistant 2

Office Assistant 2's perform moderately complex general administrative, secretarial/clerical support functions and tasks in a department, division, program, or business operation. Incumbents are assigned the full range of duties that require knowledge of and the application of general County, department or division procedures and policies. Office Assistant 2's do not primarily support executive or senior management.

Office Assistant Senior

Office Assistant Senior is an appropriate class allocation when support responsibilities are highly specialized, focused on performing responsible and difficult administrative assignments, and require program-specific, technical knowledge. Additionally, incumbents often lead, train and coordinate the work flow of office support staff, sometimes including managing volunteers. Office Assistant Senior positions are typically operations oriented and do not principally support an executive or senior manager who leads a department or division.

Administrative Specialist

Administrative Specialists perform work assignments involving a variety of highly responsible, confidential and complex administrative, secretarial, and program duties to support a County department or division director/executive manager. Administrative Specialists are given broad latitude and discretion in scheduling/rearranging the executive manager/director's time in terms of prioritizing appointments, events and planning activities, researching, compiling and summarizing data for projects, and compiling reports for the manager.

Since you spend a significant amount of your time managing the calendars, contacts and correspondence for 2 executive-level managers, as well as providing them with direct administrative, secretarial, and program support, the best fit for your position is the Administrative Specialist (6005) classification.

Appeal Rights

The outcome of a reclassification request may be appealed under Article 15 of the Local 88 contract by filing a Step 3 grievance within fifteen (15) days of receipt of this notification letter.

If you have any questions, please feel free to contact me at 503-988-5015 ext. 22342.

copy: Lois Bailor, Administrative Analyst Senior
Urmila Jhattu, HR Manager
Carolyn Edgett, HR Analyst Senior
Heather Garrett, HR Analyst Senior
Gary Miguel, HR Maintainer
Bryan Lally, Local 88
Class Comp File Copy