

Multnomah County Classification Study

Management Assistant

FY 2010/2011

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Management Assistant -- Classification Study FY 2010

Background/Purpose:

This report summarizes the findings and recommendations of a classification-only study conducted for management positions allocated to the Management Assistant (MA) classification. The management sponsored study began November 4, 2010 with a scheduled completion date in March 2011. The study was delayed due to organizational changes recommended by the Coraggio Group an external consultancy that studied County operations at the Chair's and Board's behest in 2010. The Coraggio team's report was later released by COO Joanne Fuller in January 2011.

The MA study was sponsored by Central Human Resources. Travis Graves, County Human Resources Director, and the Class Comp staff observed the Management Assistant classification was no longer utilized as originally developed. Management Assistant (MA) was designed as a direct report to a Department Director performing sensitive, confidential projects with far-reaching impact. In FY 2010-2011, very few of the positions studied met such criteria. As a management sponsored study, this project focused on: reviewing current incumbents' work assignments for accurate classification; determining which positions should retain their management status and which positions should be represented; determining if the MA job class and concept were still viable; and updating the class specifications if needed. The study was undertaken by the Class Comp team with Candace Busby as the project lead and Joi Doi, Olga Ward and Ross Ardrey of NW Management Consulting participating as other key team members. The assigned scope for this project was a classification-only study with no compensation review.

This study encompassed seven positions of which one was determined to better fit Staff Assistant as the program and incumbent reported directly to the Chair. The remaining six MA positions were located in the following departments: Office of County Attorney, Health Department (HD), Department of County Management (DCM), and Department of Community Services (DCS).

The team launched the study by meeting/communicating with all employees classified in this job class, their direct managers, and Department HR representatives. The study purpose and process were explained, questions fielded, and the importance of accurately completed position descriptions was discussed. In addition, the team's general steps and timelines/schedule were shared, and training in how to complete a position description was provided to interested attendees. The effective date for the study's results is April 16, 2011.

Basic Study Methodology & Process:

The study consisted of the following steps:

1. The purpose of the study was communicated to employees and their managers in group meetings facilitated by Class Comp with Department HR staff in attendance.
2. Individual position descriptions (PDs) were completed describing the duties performed, signed by employees, and underwent the following reviews --

- a. The position descriptions were reviewed by the employees' managers for accuracy of work assignments, primary focus, and purpose of the work.
 - b. The position descriptions were then reviewed by Department HR for consistency and completeness.
 - c. Class Comp and consultant Ross Ardrey reviewed the position descriptions and supporting documentation to ensure an understanding of the work.
3. Due to the study group's small size and diverse work assignments, Class Comp decided to audit all six positions rather than auditing 30% of all positions which is the team's customary practice for studies.
4. Desk audits/job interviews with employees and meetings with their managers were conducted by the consultant to better understand the work.
5. The information and data gathered from the position descriptions and interviews were used by Class Comp to develop a matrix outlining the characteristics, purpose, primary functions and qualifications for each position in the study.
6. Once the matrices were complete, Class Comp reviewed the preliminary findings with the HR Director.

Summary and Findings:

Based on employees' position descriptions, data and information collected from desk audits, input from employees, managers, and the consultant, the Central Human Resources determined only one of the six positions functioned as the Management Assistant job class was written and intended. The Class Comp team learned, historically MA jobs were meant to function as a single, high-level executive assistant reporting directly to the Department Director. MAs were routinely assigned privileged, highly sensitive, confidential and complex projects and were also used as executive troubleshooters and problem solvers at the Director's behest. Department Directors generally had only one Management Assistant; most department executives given the broad nature of their businesses and strong leadership teams chose not to use Management Assistant.

Not all management designated positions in the study remained non-represented. Specifically, one position in DCM and one position in DCS did not meet the Public Employees Collective Bargaining Act (PECBA) requirements for exclusion from the union based on their regular work assignments. These two positions were reclassified to Local 88 bargaining unit classifications that better fit the work being performed. Other positions in this study met PECBA requirements for exclusion and were subsequently reclassified to other management job classes that better described their work assignments. Following County compensation policy, pay was not decreased but "red-circled/frozen" when reclassified employees' salaries exceeded the pay ranges of their new classifications.

Allocation Guidelines:

Classifying positions (allocations) is based on the jobs' required knowledge / skills, supervision received/exercised, complexity of work, major responsibilities, accountability, scope/impact, and qualifications needed to perform the work. Positions were allocated to the following classifications utilizing said criteria as well as the team's and consultant's findings:

The allocation decision guidelines were:

- Administrative Analyst (6033 represented) – PSG 26: Perform a variety of responsible professional, technical, and analytical work in providing administrative support services within a division or department; and to provide a variety of administrative services in the areas of finance administration, personnel administration, management analysis, training, purchasing, contract management, property management, public information, data processing, office support, and other related services and functions.
- Budget Analyst (6026 represented) – PSG 28: Develop, monitor, and maintain the department, division and/or program yearly budget in accordance with Oregon budget law, County policies and procedures; perform professional financial analysis of current and prior year fiscal activities for the development and ongoing monitoring of the department, division, and/or program budget. Produce sophisticated managerial reports and forecasting models for executive/senior management relating to business/operating budgets and actual expenses and revenues to be used in for the development, administration, and strategic planning for a department, division, and/or program budget. Budget Analysts focus on complex financial analysis as related to the development, monitoring and administration of the budget and provide functional and technical supervision over assigned fiscal and/or administrative staff for departmental budgeting.
- Administrative Analyst/SR, (9005 non-represented) – PSG 123: Perform a variety of advanced professional administrative and/or technical support activities within a division or department. Provide management support services in the areas of: contracts management, information management, management analysis, personnel administration, finance, purchasing, office support, and other related services and functions. Plan, organize, and supervise administrative and/or technical support activities within a division or department; to provide complex staff assistance for assigned manager. Employees exercise direct supervision over a small group, typically consisting of one to four (1-4) professional, technical, and clerical workers.
- Paralegal (9054 non-represented) – PSG 222: Manage and coordinate a variety of technical legal services and projects including monitoring and evaluation, policy and legislative administrative analysis, and legal and fiscal research and review. Prepare, coordinate and facilitate presentation of Board matters, and liaison to County departments the board and outside public and private agencies.
- Management Assistant (9710 non-represented) – PSG 127: Plan, direct and perform an executive leadership role on behalf of the Department Director as her/his executive direct report. Perform a variety of complex, highly visible/sensitive projects and work assignments on behalf of the Department Director and function as a key contributor/member on the department leadership team. Assignments include program monitoring and evaluation, leading strategic planning activities and coordinating public information and meetings on behalf of the Department Director.

Unlike most studies where the majority of position allocations remain unchanged, only one position remained assigned to the Management Assistant classification based upon current as well as future assignments. The position resides in the Department of Community Services (DCS) and has a 70% focus as the Department Director's administrative project manager for the construction of the new Sellwood Bridge – a project that's estimated to last six years. While DCS has engineering managers and staff to oversee/manage the technical aspects of the new bridge's

construction, Director Johnson has tasked this MA position to: monitor the overall project; coordinate/manage public information and associated meetings; oversee administrative logistics and contract administration associated with this massive project; and prepare/manage briefings for the Director on her behalf to the Board and community at large.

Following Class Comp's standard practice, the study report, and individual allocation notices will be distributed to employees, managers, and Department HR staff explaining the effective dates and any implications of the reclassification actions. Although management employees have no "appeal" rights regarding classification decisions, Class Comp will review arguments/input from individual employees who believe their allocations are incorrect. Class Comp would like to thank the employees, managers, Department HR teams, Ross Ardrey, and other members of Central Human Resources who participated in this study. Their assistance and contributions of time and expertise were invaluable.

Position descriptions, interview notes, allocation notice information, and updated job class specifications are on file for this study in Central HR.