



**MULTNOMAH COUNTY
AGENDA PLACEMENT REQUEST
BUDGET MODIFICATION**

(Revised: 5/24/13)

APPROVED: MULTNOMAH COUNTY
BOARD OF COMMISSIONERS
AGENDA # C.1 DATE 9/5/13
LYNDA GROW, BOARD CLERK

Board Clerk Use Only

Meeting Date: 9/5/13
Agenda Item #: C.1
Est. Start Time: 9:30 am
Date Submitted: 8/7/13

Agenda Title: BUDGET MODIFICATION # HD-14-02 authorizing four position re-classifications within various divisions of the Health Department.

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: September 5, 2013 **Time Needed:** N/A - Consent
Integrated Clinical Services & Director's Office

Department: Health Department **Division:** _____

Contact(s): Lester A. Walker - Budget & Finance Manager

Phone: (503) 988-3663 **Ext.** 26457 **I/O Address:** 167/2/210

Presenter Name(s) & Title(s): N/A (Consent Agenda)

General Information

- 1. What action are you requesting from the Board?**
Approval of staffing adjustments resulting from the reclassification of four positions. This change will not impact the Health Department's total FTE for FY2014.
- 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.**
Reclassify a 1.00 FTE Data Analyst to a 1.00 FTE Operations Process Specialist, position 712399, in the Integrated Clinical Services Division of the Health Department. Class Comp approved the reclassification effective 08/02/2013 (reclassification #2266). The duties and responsibilities of the position have gradually changed. This position will be responsible for serving as an expert in the use of clinical systems to improve and support clinical and operational workflows. This position will work with end-users and leadership to identify, analyze, and clarify areas for improvement in systems, hardware, and workflows; complete application configuration; maintain user security; monitor and resolve electronic interface errors; facilitate and coordinate requests for new workflow and functionality, upgrades,

fixes, and implementations; develop and revise training documents, operational process toolkits, and curriculum; and provide training.

This change impacts program offer 40032—Lab and Medical Records.

Reclassify a 1.00 FTE Office Assistant 2 to a 1.00 FTE Office Assistant Senior, position 714960, in the Director's Office of the Health Department. Class Comp approved the reclassification effective 12/24/2012 (reclassification #2245). The duties and responsibilities of the position have gradually increased. This position is responsible for providing administrative support to the Emergency Response Program including managing the calendar, creating spreadsheets, performing data entry, and updating the database; performing timekeeping functions; updating and maintaining conference room calendars; receiving, sorting, and distributing incoming/outgoing correspondence; serving as the Health Alert Network Administrator; assisting the public and other staff in interpreting and applying policies, procedures, laws, and ordinances; researching, analyzing, completing, and summarizing data for special projects and reports; ordering and maintaining office supplies; and updating standard procedures, methods, and instructions to improve workflow.

This change impacts program offer 40003—Health Department Leadership Team Support.

Reclassify a 1.00 FTE Community Health Specialist 1 to a 1.00 FTE Community Health Specialist 2, position 716203, in the Integrated Clinical Services Division of the Health Department. Class Comp approved the reclassification effective 07/01/2013 (reclassification #2246). This is a new position and has been created as a result of the Coordinated Care legislation. This position will be responsible for performing community needs assessment and developing outreach plans; coordinating and collaborating with community partners in referring clients to appropriate resources; representing and promoting the program to community members and agencies; conducting outreach to specific communities; planning and delivering interactive health education classes and presentations; sharing culturally appropriate, department-approved health education and information with individuals, families, and groups; and developing and maintaining effective working relationships with team members and assigned communities.

This change impacts program offer 40034A—Quality Assurance.

Reclassify a 1.00 FTE Community Health Specialist 1 to a 1.00 FTE Community Health Specialist 2, position 716204, in the Integrated Clinical Services Division of the Health Department. Class Comp approved the reclassification effective 07/01/2013 (reclassification #2246). This is a new position and has been created as a result of the Coordinated Care legislation. This position will be responsible for performing community needs assessment and developing outreach plans; coordinating and collaborating with community partners in referring clients to appropriate resources; representing and promoting the program to community members and agencies; conducting outreach to specific communities; planning and delivering interactive health education classes and presentations; sharing culturally appropriate, department approved health education and information with individuals, families, and groups; and developing and maintaining effective working relationships with team members and assigned communities.

This change impacts program offer 40034A—Quality Assurance.

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

This budget modification has no fiscal impact in the current year. Budgeted personnel costs are within the pay scales of new classifications or other budgeted line items have been adjusted so that the changes are budget neutral.

The reclassification of position 714960 to an Office Assistant Senior increased budgeted personnel cost by \$2,966 because the step at which the Office Assistant Senior is budgeted is higher than the step at which the Office Assistant 2 is budgeted. The increase in cost is offset by a decrease in supplies for no net fiscal impact this fiscal year.

The reclassification of position 716203 to a Community Health Specialist 2 increased personnel cost by \$7,283 because the step at which the Community Health Specialist 2 is budgeted is higher than the step at which the Community Health Specialist 1 is budgeted. The increase in cost is offset by a decrease in professional services and printing for no net fiscal impact this fiscal year.

The reclassification of position 716204 to a Community Health Specialist 2 increased personnel cost by \$7,283 because the step at which the Community Health Specialist 2 is budgeted is higher than the step at which the Community Health Specialist 1 is budgeted. The increase in cost is offset by a decrease in professional services and printing for no net fiscal impact this fiscal year.

In subsequent fiscal years, the reclassified positions will be subject to approved cost of living adjustments (COLA) and step and merit pay increases in accordance with collective bargaining agreements and county personnel rules. Increased costs will be funded within the department's budget.

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).**

No change in revenues.

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

The Health Department's budget will have the following changes:

- Permanent personnel budget will increase by \$12,465
- Salary related expense budget will increase by \$4,133
- Insurance benefits budget will increase by \$934
- Professional Services budget will decrease by \$2,000
- Printing budget will decrease by \$12,566
- Supplies budget will decrease by \$2,966

These changes will have no financial impact on the budget and do not change the Health Department's total FTE.

• **What do the changes accomplish?**

Changes of classification for positions 712399, 714960, 716203, and 716204 better fit the duties of this position as determined by the Class/Comp Unit of the Central Human Resources.

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

- Reclassify a 1.00 FTE Data Analyst to a 1.00 FTE Operations Process Specialist, position 712399, in the Integrated Clinical Services Division of the Health Department. Class Comp approved #2266.
- Reclassify a 1.00 FTE Office Assistant 2 to a 1.00 FTE Office Assistant Senior, position 714960, in the Director's Office of the Health Department. Class Comp approved #2245.
- Reclassify a 1.00 FTE Community Health Specialist 1 to a 1.00 FTE Community Health Specialist 2, position 716203, in the Integrated Clinical Services Division of the Health Department. Class Comp approved #2246.
- Reclassify a 1.00 FTE Community Health Specialist 1 to a 1.00 FTE Community Health Specialist 2, position 716204, in the Integrated Clinical Services Division of the Health Department. Class Comp approved #2246.

• **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 or Dept Director:	Wendy Lear for Lillian Shirley/s/	Date: 7/30/2013
Budget Analyst:	Althea Gregory /s/	Date: 8/8/2013
Department HR:	Larry Brown for Kathleen Fuller-Poe/s/	Date: 7/30/2013
Countywide HR:	Karie Miller/s/	Date: 8/6/2013

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: **HD-14-02**

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			Current Amount	Revised Amount	Change Increase/ (Decrease)	Subtotal	Description
						Cost Center	WBS Element	Cost Element					
1	40-00	1000	40003	0030		400020		60000	307,139	309,248	2,109		Increase Permanent
2	40-00	1000	40003	0030		400020		60130	102,726	103,425	699		Increase Salary Related Expns
3	40-00	1000	40003	0030		400020		60140	123,688	123,846	158		Increase Insurance Benefits
4	40-00	1000	40003	0030		400020		60240	11,577	8,611	(2,966)		Decrease Supplies
5										0			
6	40-80	10020	40034A	0030			4CA210-7	60000	448,274	458,630	10,356		Increase Permanent
7	40-80	10020	40034A	0030			4CA210-7	60130	149,714	153,148	3,434		Increase Salary Related Expns
8	40-80	10020	40034A	0030			4CA210-7	60140	146,489	147,265	776		Increase Insurance Benefits
9	40-80	10020	40034A	0030			4CA210-7	60170	3,583	1,583	(2,000)		Decrease Professional Services
10	40-80	10020	40034A	0030			4CA210-7	60180	14,700	2,134	(12,566)		Decrease Printing
11													
12	72-80	3500		0020		705210		50316	(63,557,774)	(63,558,708)	(934)		Insurance Revenue
13	72-80	3500		0020		705210		60330	2,124,430	2,125,364	934		Offsetting Expenditure
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/O	Position Title	Position Number	FTE	BASE PAY	FRINGE	INSUR	TOTAL
1000	6073	64530	47020-GF	DATA ANALYST	712399	(1.00)	(54,142)	(17,948)	(18,213)	(90,303)
1000	6500	64530	47020-GF	OPERATIONS PROCESS SPECIALIST	712399	1.00	54,142	17,948	18,213	90,303
1000	6001	64680	400020	OFFICE ASSISTANT 2	714960	(1.00)	(34,682)	(11,497)	(16,753)	(62,932)
1000	5002	64680	400020	OFFICE ASSISTANT SENIOR	714960	1.00	36,791	12,196	16,911	65,898
10020	6046	66931	4CA210-7	COMMUNITY HEALTH SPECIALIST 1	716203	(1.00)	(32,740)	(10,853)	(16,608)	(60,201)
10020	6047	66931	4CA210-7	COMMUNITY HEALTH SPECIALIST 2	716203	1.00	37,918	12,570	16,996	67,484
10020	6046	66931	4CA210-7	COMMUNITY HEALTH SPECIALIST 1	716203	(1.00)	(32,740)	(10,853)	(16,608)	(60,201)
10020	6047	66931	4CA210-7	COMMUNITY HEALTH SPECIALIST 2	716203	1.00	37,918	12,570	16,996	67,484
TOTAL ANNUALIZED CHANGES						0.00	12,465	4,133	934	17,532

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/O	Position Title	Position Number	FTE	BASE PAY	FRINGE	INSUR	TOTAL
1000	6073	64530	47020-GF	DATA ANALYST	712399	(0.92)	(49,811)	(16,512)	(16,756)	(83,079)
1000	6500	64530	47020-GF	OPERATIONS PROCESS SPECIALIST	712399	0.92	49,811	16,512	16,756	83,079
1000	6001	64680	400020	OFFICE ASSISTANT 2	714960	(1.00)	(34,682)	(11,497)	(16,753)	(62,932)
1000	6002	64680	400020	OFFICE ASSISTANT SENIOR	714960	1.00	36,791	12,196	16,911	65,898
10020	6046	66931	4CA210-7	COMMUNITY HEALTH SPECIALIST 1	716203	(1.00)	(32,740)	(10,853)	(16,608)	(60,201)
10020	6047	66931	4CA210-7	COMMUNITY HEALTH SPECIALIST 2	716203	1.00	37,918	12,570	16,996	67,484
10020	6046	66931	4CA210-7	COMMUNITY HEALTH SPECIALIST 1	716204	(1.00)	(32,740)	(10,853)	(16,608)	(60,201)
10020	6047	66931	4CA210-7	COMMUNITY HEALTH SPECIALIST 2	716204	1.00	37,918	12,570	16,996	67,484
TOTAL CURRENT FY CHANGES						0.00	12,465	4,133	934	17,532

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							
19	1000	0020		9500001000		60470	Reduce available General Fund Contingency
xx-xx	xxxxx	0020		xxx	xxx	xxxxx	Increase Expenditure
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		709599		50310	Budgets receipt of Data Processing reimbursement
78-70	3503	0020		709599		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.