



MULTNOMAH COUNTY AGENDA PLACEMENT REQUEST BUDGET MODIFICATION

(Revised: 8/18/11)

APPROVED: MULTNOMAH COUNTY
BOARD OF COMMISSIONERS
AGENDA # C-3 DATE 11/29/12
MARINA BAKER, ASST BOARD CLERK

Board Clerk Use Only

Meeting Date: 11/29/12
Agenda Item #: C.3
Est. Start Time: 9:30 am
Date Submitted: 11/16/12

Agenda Title: **BUDGET MODIFICATION # DCHS13-11 reclassifying a full-time Data Technician position to an Administrative Analyst in the Department of County Human Services.**

Note: For all other submissions (i.e. Notices of Intent, Ordinances, Resolutions, Orders or Proclamations) please use the APR short form.

Requested Meeting Date: Next Available **Time Needed:** N/A (Consent)

Department: County Human Services **Division:** Developmental Disabilities Services

Contact(s): Ed Jones

Phone: 503-988-3691 **Ext.** 29340 **I/O Address:** _____

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

General Information

1. What action are you requesting from the Board?

The Department of County Human Services (DCHS) is requesting approval of budget modification DCHS13-11, authorizing the reclassification a full-time Data Technician position to an Administrative Analyst in the Developmental Disabilities Services Division (DDSD) of the Department of County Human Services, as determined by the Class/Comp unit of Central Human Resources, Reclassification Request #2029.

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.

In the FY2013 budget a new Data Technician was added to Program Offer 25011 – DD Systems, Contracts and Budget. The Central Human Resources, Class/Comp unit, reviewed the scope of work and duties to be associated with this position, and determined that the most appropriate classification was an Administrative Analyst. This position was added in the FY2013 budget due to the significant increase of clients entering In-Home

Support and the additional state requirements surrounding DDSD services. The position will do the following:

- Partner with other departments, DDSD program, administrative and financial staff to ensure In-Home Support services comply with the additional Oregon Administrative Rules (OARs) for each of 12 developmental disability services funded by the State.
- Ensure that service contracts and service providers meet the additional OARs program instructions with regards to service level and quality.
- Fulfill DDSD's programmatic reporting requirements to the state.
- Contract coordination in terms of rates and contract changes.
- Develop and maintain programmatic spreadsheets to track funds/hours for individual plans.
- Review, analyze, track and recommend changes for division policies.
- Provide support to the DDSD's business section during the yearly budget process.

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

The Administrative Analyst position is a higher classification than the budgeted Data Technician position by approximately \$16,311 annually. However, the position is vacant. The current fiscal year's (FY2013) personnel cost are estimated to increase by \$10,765. The increased cost will be mitigated through a reduction in supply and travel cost. Subsequent year personnel cost increases will be determined by the approved merit and COLA increases, and will be absorbed within the division'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 revenue is being changed.
- **What budgets are increased/decreased?**
There is no financial budget impact associated with this reclassification.
- **What do the changes accomplish?**
This budget modification implements the decision from the HR Class/Comp unit to reclassify a Data Technician position to an Administrative Analyst in order to accurately reflect the functions and duties of the position involved.
- **Do any personnel actions result from this budget modification? Explain.**
Yes. The approval of this budget modification will result in reclassifying a position in Developmental Disabilities Services from a Data Technician to an Administrative Analyst, as determined by the Class/Comp unit of Central Human Resources.
- **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.

Required Signature

Elected Official or Dept Director: Kathy Tinkle for Susan Myers \s\ **Date:** 10/31/12

Budget Analyst: Jennifer Unruh \s\ **Date:** 11-16-12

Department HR: Unnida Shattu **Date:** 11-15-12



Department of County Management
MULTNOMAH COUNTY OREGON

Human Resources
Multnomah Building -- 501 SE Hawthorne, Suite 300
Portland, Oregon 97214

To: Dan Haynes, Department of County Human Services: DDSD
From: Joi Doi/Karie Miller Classification and Compensation Unit (503/3)
Date: October 4, 2012
Subject: Classification Request #2029 (updated from 1936, Admin Analyst)

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

Request Information:

Date Request Received: September 28, 2012	Position Number: 715303
Current Classification: N/A	Requested Classification: Administrative Analyst
Job Class Number: N/A	Job Class Number: 6033
Pay Grade: N/A	Pay Grade: 26
Request is: <input checked="" type="checkbox"/> Approved as Requested	Effective Date: October 4, 2012
Allocated Classification: Administrative Analyst	Job Class Number: 6033
Pay Range: \$51,323.04 - \$63,162.00 Annually	Pay Grade: 26

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:

☒ Vacant (see New/Vacant Section) ☒ Represented

New/Vacant Position Information:

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

Reason for Classification Decision:

This is a new position is in the Developmental Disabilities Services Division (DDSD) and is being established to address the significant increase of clients entering In-Home Support along with additional state requirements. It is designed to partner with other department, DDSD program, administrative and Finance staff to ensure In Home Services comply with Oregon Admin. Rules (OARs) for each of 12 developmental disability services funded by the State. This new position will help ensure pass-through service contracts and service providers meet OARs program instructions with regards to service level and quality. Other duties include providing timely reports to the State on expenditures; assisting with contract coordination in terms of rates and contract changes; developing and maintaining spreadsheets to track funds/hours for individual plans; working with DCHS Business Services verifying expenditures and managing on-going support services funding and expenditures; and authoring/providing on-going reports to managers and executives. Additionally this position will work with DDSD's Sr. Program Specialist to provide support during the annual budgeting process for DCHS Business Services and as required by the County's Budget Office. Lastly, this position will review, analyze, track and recommend changes to division policies.

Based upon a revised position description submitted in late September, consideration was given to the Administrative Assistant, Administrative Analyst and Finance Specialist 1 classifications during the review of this position.

- The *Administrative Assistant (6054)* class provides administrative and staff assistance to a department or division director in typically a 1 to 1 basis. This class is distinguished from other administrative classifications by less than 20 percent of the workload is focused on clerical duties, and it is expected to independently perform critical and often confidential research tasks on behalf of the director. Work assignments in this classification consist of paraprofessional administrative duties that are broad in scope, and incumbents have significant involvement on behalf of the director with the budget. Positions in this classification assist in the development of parts of the budget, including drafting budget narrative, estimating funds needed, projecting revenues and expenditures, preparing reports, coordinating accounts receivable and accounts payable functions, and reconciling expenditure and revenue reports. Qualifications for this class are the equivalent to completion of high school and four years of increasingly responsible secretarial or technical administrative support experience.

This new position in DDSD has broader duties, does not directly support one director, and has more program interface.

- The *Administrative Analyst (6033)* class provides professional, technical, and analytical work 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. Positions in this classification coordinate the development of the budget including gathering data and preparing budget forms; projecting revenues and expenditures; monitoring the budget and assisting in identifying, preparing, and processing budget modifications; preparing revenue and expenditure reports; and coordinating accounts receivable and accounts payable functions. Incumbents will review, analyze, and recommend improvements and modifications to department or division policies and procedures. Qualifications for this class are the equivalent to an Associate of Arts degree with two years of increasingly responsible secretarial and administrative support experience.
- The *Finance Specialist 1 (6029)* provides regular and ongoing analysis, interpretation, and some independent action with regards to financial operations and transactions. Finance Specialist [FS] 1 conducted out limited analyses of accounts, funds, systems and/or other information to process payments, billing, or accounts receivables. Work is subject to review by higher-level accounting, Finance or management staff. Positions in this classification perform routine account reconciliation, and prepare deposits, invoices, payments, work sheets, and schedules. Incumbents will analyze data and prepare reports regarding periodic or annual expenditures, revenue statements, budget, projections, and other fiscal reports. FS 1s assist in the preparation of annual financial statements; monitor expenditures for budget compliance; and may provide functional and/or technical guidance to other staff.

This new position as defined is more focused on program compliance, analysis of services, and the coordination of changes to contracts and rate changes, versus an emphasis on fiscal duties.

Given the level of autonomy needed, types and focus of work assignments, policy analysis, research, and evaluation duties, and qualifications as described, best fit the represented Administrative Analyst (6033) classification.

Thank you, Dan for your patience on this request, and also for meeting/working with Kathy Tinkle, DCHS Deputy Director who also oversees DCHS' Business Services to clarify the duties of this new position and how it fits with Business Services. If you have any questions, please feel free to contact Karie Miller at 503-988-5015 ext. 22342, or me at ext. 24422.

cc: Urmila Jhattu, HR Manager
Jacob Schiffer, HR Analyst
Gary Miguel, HR Maintainer
Kathy Tinkle, Deputy Director
Bryan Lally, Local 88
Class Comp File Copy

Budget Modification ID: **DCHS13-11****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	25011	40			DD10 BUS SVC LA	60000		7,852	7,852		Permanent
2	20-50	80001	25011	40			DD10 BUS SVC LA	60130		2,285	2,285		Salary Related Expns
3	20-50	80001	25011	40			DD10 BUS SVC LA	60140		628	628		Insurance Benefits
4	20-50	80001	25011	40			DD10 BUS SVC LA	60240		(5,383)	(5,383)		Supplies
5	20-50	80001	25011	40			DD10 BUS SVC LA	60260		(5,382)	(5,382)		Travel & Training
6										0			
7										0			
8										0			
9										0			
10										0			
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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 CHANGEChange 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	6002	65455	DD10 BUS SVC LA	Data Technician	715303	(1.00)	(39,229)	(11,416)	(17,290)	(67,935)
80001	6033	65455	DD10 BUS SVC LA	Administrative Analyst	715303	1.00	51,126	14,878	18,242	84,246
										0
										0
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TOTAL ANNUALIZED CHANGES						0.00	11,897	3,462	952	16,311

CURRENT YEAR PERSONNEL DOLLAR CHANGECalculate 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
80001	6002	65455	DD10 BUS SVC LA	Data Technician	715303	(0.66)	(25,891)	(7,535)	(11,411)	(44,837)
80001	6033	65455	DD10 BUS SVC LA	Administrative Analyst	715303	0.66	33,743	9,819	12,040	55,602
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TOTAL CURRENT FY CHANGES						0.00	7,852	2,285	628	10,765