



# MULTNOMAH COUNTY AGENDA PLACEMENT REQUEST BUDGET MODIFICATION

(Revised: 09/23/13)

APPROVED: MULTNOMAH COUNTY  
BOARD OF COMMISSIONERS  
AGENDA # C.1 DATE 1-9-14  
LYNDA GROW, BOARD CLERK

## Board Clerk Use Only

Meeting Date: 1/9/14  
Agenda Item #: C.1  
Est. Start Time: 930 am  
Date Submitted: 12/6/13

**Agenda Title:** BUDGET MODIFICATION # HD-14-08 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:** January 9, 2014 **Time Needed:** N/A - Consent  
Community Health Services, Policy & Planning, & Human Resources

**Department:** Health Department **Division:** \_\_\_\_\_

**Contact(s):** Robert Stoll - Budget & Finance Manager

**Phone:** (503) 988-8445 **Ext.** 88445 **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 Community Health Specialist 2 to a 1.00 FTE Health Educator, position 712989, in the Community Health Services Division of the Health Department. Class Comp approved the reclassification effective 09/10/2013 (reclassification #2313). This position is being reclassified due to changes in span of control, funding, and best practices which have resulted in a shift in responsibilities that include fewer Community Health Specialist 2 components of direct health education with individuals and groups. This position will be responsible for researching and recommending evidence based interventions utilizing health behavior theory, community empowerment models, and

popular education methodologies to reduce sexual health disparities; developing and evaluating sexuality education sessions, curriculum, and materials; reviewing and evaluating existing curriculum for accuracy and appropriateness and aligning health education with Oregon Department of Education Standards and grant-funded objectives.

This change impacts program offer 40025—Adolescent Health Promotion.

Reclassify a 1.00 FTE Research Evaluation Analyst 2 to a 1.00 FTE Research Evaluation Analyst Senior, position 702028, in the Policy & Planning Division of the Health Department. Class Comp approved the reclassification effective 02/15/2013 (reclassification #2297). The duties and responsibilities of this position have gradually changed. This position is responsible for providing advanced level research, evaluation, and leadership for the Health Department quality programs and projects and serves as the Public Health Accreditation Coordinator, which includes providing leadership and project management to prepare, apply, and achieve National Public Health Accreditation status. In addition, the position is responsible for independently planning, designing, and performing complex quantitative and qualitative analysis and interpretation using software and statistical methodologies for short-term and multi-year projects.

This change impacts program offer 40035A—Health Assessment, Planning and Evaluation.

Reclassify a 1.00 FTE Research Evaluation Analyst 2 to a 1.00 FTE Research Evaluation Analyst Senior, position 714282, in the Policy & Planning Division of the Health Department. Class Comp approved the reclassification effective 02/15/2013 (reclassification #2298). The duties and responsibilities of this position have gradually changed. This position is responsible for planning, designing, and conducting complex assessments to evaluate the health impacts of programs, projects, and policies and develops innovative methodologies that employ quantitative and qualitative techniques and spatial analyses. In addition, this position is responsible for serving as lead in conducting analyses for department-wide population surveillance reports, serving on the Oregon/Multnomah County Health Institutional Review Board (IRB), collaborating with the Health Officer to develop IRB policies and providing technical assistance to staff applying for IRB approval, and identifying appropriate performance measures.

This change impacts program offer 40035A—Health Assessment, Planning and Evaluation.

Reclassify a 0.63 FTE Human Resources Analyst 2 to a 0.63 FTE Human Resources Analyst Senior, position 714917, in the Human Resources Division of the Health Department. Class Comp approved the reclassification effective 03/20/2013 (reclassification #2319). The duties and responsibilities of this position have gradually changed. This position is responsible for providing advance support to assigned customers on multiple human resources functional areas and performing complex work assignments independently—advising managers and supervisors in resolving employee conflicts, reviewing performance evaluations and making recommendations to managers when necessary, and coaching and orienting managers and supervisors on administering discipline. In addition, this position is responsible for providing advice to manager and supervisors on responding to various steps of the collective bargaining grievance process and serves as the subject matter expert for classification and compensation functions—including analysis of position descriptions and ensuring consistency and appropriateness of requests throughout the Health Department.

This change impacts program offer 40039—Business and Quality – Human Resources and Training.

**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 the new classifications or other budgeted line items have been adjusted so that the changes are budget neutral.

The reclassification of position 712989 to a Health Educator increased budgeted personnel cost by \$7,426 because the step at which a Health Educator is budgeted is higher than the step at which a Community Health Specialist 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 702028 to a Research Evaluation Analyst Senior increased budgeted personnel cost by \$5,202 because the step at which the Research Evaluation Analyst Senior is budgeted is higher than the step at which a Research Evaluation Analyst 2 is budgeted. The increase in cost is offset by a decrease in printing, supplies, travel & training, software license/maintenance, and dues & subscriptions for no net fiscal impact this fiscal year.

The reclassification of position 714282 to a Research Evaluation Analyst Senior increased budgeted personnel cost by \$2,232 because the step at which the Research Evaluation Analyst Senior is budgeted is higher than the step at which a Research Evaluation Analyst 2 is budgeted. The increase in cost is offset by a decrease in printing, supplies, travel & training, software license/maintenance, and dues & subscriptions for no net fiscal impact this fiscal year.

The reclassification of position 714917 to a Human Resources Analyst Senior increased budgeted personnel cost by \$5,565 because the step at which the Human Resources Analyst Senior is budgeted is higher than the step at which a Human Resources Analyst 2 is budgeted. The increase in cost is offset by a decrease in professional services, repairs & maintenance, supplies, and travel & training 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

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**Budget Modification**

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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 \$14,430
- Salary related expense budget will increase by \$4,913
- Insurance benefits budget will increase by \$1,082
- Professional services budget will decrease by \$1,000
- Printing budget will decrease by \$1,500
- Repairs and maintenance budget will decrease by \$1,000
- Supplies budget will decrease by \$8,926
- Travel & training budget will decrease by \$4,065
- Software License/Maintenance budget will decrease by \$3,055
- Dues & subscriptions budget will decrease by \$879

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 712989, 702028, 714282, and 714917 better fit the duties of these positions as determined by the Class/Comp Unit of Central Human Resources.

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

- Reclassify a 1.00 FTE Community Health Specialist 2 to a 1.00 FTE Health Educator, position 712989, in the Community Health Services Division of the Health Department. Class Comp approved #2313.
- Reclassify a 1.00 FTE Research Evaluation Analyst 2 to a 1.00 FTE Research Evaluation Analyst Senior, position 702028, in the Policy & Planning Division of the Health Department. Class Comp approved #2297.
- Reclassify a 1.00 FTE Research Evaluation Analyst 2 to a 1.00 FTE Research Evaluation Analyst Senior, position 714282, in the Policy & Planning Division of the Health Department. Class Comp approved #2298.
- Reclassify a 0.63 FTE Human Resources Analyst 2 to a 0.63 FTE Human Resources Analyst Senior, position 714917, in the Human Resources Division of the Health Department. Class Comp approved #2319.

- **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:** KaRin Johnson for Joanne Fuller **Date:** 12/03/13

**Budget Analyst:** Althea Gregory /s/ **Date:** 12/06/13

**Department HR:** Kathleen Fuller-Poe /s/ **Date:** 10/22/13

**Countywide HR:** Karie M. Miller /s/ **Date:** 12/06/13

*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-14-08****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	Accounting Unit			Cost Element	Current Amount	Revised Amount	Change Increase/ (Decrease)	Subtotal	Description
					Internal Order	Cost Center	WBS Element						
1	40-30	1000	40025	0030			44503-GF	60000	129,386	132,026	2,640		Increase Permanent
2	40-30	1000	40025	0030			44503-GF	60130	44,442	45,317	875		Increase Salary Related Expns
3	40-30	1000	40025	0030			44503-GF	60140	43,557	43,755	198		Increase Insurance Benefits
4	40-30	1000	40025	0030			44503-GF	60240	10,823	7,110	(3,713)		Decrease Supplies
5									0				
6	40-30	32244	40025	0030			4CA94-07-1	60000	154,897	157,537	2,640		Increase Permanent
7	40-30	32244	40025	0030			4CA94-07-1	60130	52,894	53,769	875		Increase Salary Related Expns
8	40-30	32244	40025	0030			4CA94-07-1	60140	55,072	55,270	198		Increase Insurance Benefits
9	40-30	32244	40025	0030			4CA94-07-1	60430	4,945	1,232	(3,713)		Decrease Intl Svc Bldg Mgmt
10									0				
11	40-30	1000	40025	0030			44503-GF	60430	20,298	24,011	3,713		Increase Intl Svc Bldg Mgmt
12	40-30	1000	40025	0030			44503-GF	60240	7,110	3,397	(3,713)		Decrease Supplies
13									0				
14	40-16	1000	40035A	0030		401601		60000	535,200	540,441	5,241		Increase Permanent
15	40-16	1000	40035A	0030		401601		60130	184,832	186,632	1,800		Increase Salary Related Expns
16	40-16	1000	40035A	0030		401601		60140	143,454	143,847	393		Increase Insurance Benefits
17	40-16	1000	40035A	0030		401601		60180	3,000	1,500	(1,500)		Decrease Printing
18	40-16	1000	40035A	0030		401601		60240	1,857	1,357	(500)		Decrease Supplies
19	40-16	1000	40035A	0030		401601		60260	2,960	1,460	(1,500)		Decrease Travel & Training
20	40-16	1000	40035A	0030		401601		60290	9,790	6,735	(3,055)		Decrease Software Lic/Maint
21	40-16	1000	40035A	0030		401601		60340	2,000	1,121	(879)		Decrease Dues & Subscriptions
22													
23	40-90	1000	40039	0030		409300		60000	857,647	861,556	3,909		Increase Permanent
24	40-90	1000	40039	0030		409300		60130	291,128	292,491	1,363		Increase Salary Related Expns
25	40-90	1000	40039	0030		409300		60140	236,185	236,478	293		Increase Insurance Benefits
26	40-90	1000	40039	0030		409300		60170	2,500	1,500	(1,000)		Decrease Professional Services
27	40-90	1000	40039	0030		409300		60220	1,899	899	(1,000)		Decrease Repairs and Maint
28	40-90	1000	40039	0030		409300		60240	3,500	2,500	(1,000)		Decrease Supplies
29	40-90	1000	40039	0030		409300		60260	6,765	4,200	(2,565)		Decrease Travel & Training
										0		0	Total - Page 1
										0		0	GRAND TOTAL

Budget Modification ID: **HD-14-08****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		Cost Element	Current Amount	Revised Amount	Change Increase/ (Decrease)	Subtotal	Description
						Cost Center	WBS Element						
30	72-80	3500		0020		705210		50316	0	(1,082)	(1,082)		Insurance Revenue
31	72-80	3500		0020		705210		60330	0	1,082	1,082		Offsetting Expenditure
32										0			
33										0			
34										0			
35										0			
36										0			
37										0			
38										0			
39										0			
40										0			
41										0			
42										0			
43										0			
44										0			
45										0			
46										0			
47										0			
48										0			
49										0			
50										0			
51										0			
52										0			
53										0			
54										0			
55										0			
56										0			
57										0			
58										0			
											0	0	Total - Page 2
											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	6047	66232	44503-GF	COMMUNITY HEALTH SPECIALIST 2	712989	(0.50)	(20,744)	(6,877)	(8,632)	(36,253)
1000	6352	66232	44503-GF	HEALTH EDUCATOR	712989	0.50	24,044	7,971	8,879	40,894
32244	6047	66232	4CA94-07-1	COMMUNITY HEALTH SPECIALIST 2	712989	(0.50)	(20,744)	(6,877)	(8,632)	(36,253)
32244	6352	66232	4CA94-07-1	HEALTH EDUCATOR	712989	0.50	24,044	7,971	8,879	40,894
1000	6086	65315	401601	RESEARCH/EVALUATION ANALYST 2	702028	(1.00)	(64,603)	(22,527)	(18,997)	(106,127)
1000	6087	65315	401601	RESEARCH/EVALUATION ANALYST/SR	702028	1.00	68,257	23,801	19,271	111,329
1000	6086	65315	401601	RESEARCH/EVALUATION ANALYST 2	714282	(1.00)	(64,603)	(21,416)	(18,997)	(105,016)
1000	6087	65315	401601	RESEARCH/EVALUATION ANALYST/SR	714282	1.00	66,190	21,942	19,116	107,248
1000	9670	64785	409300	HUMAN RESOURCES ANALYST 2	714917	(0.63)	(39,089)	(13,630)	(11,005)	(63,724)
1000	9748	64785	409300	HUMAN RESOURCES ANALYST, SENIOR	714917	0.63	42,998	14,993	11,298	69,289
TOTAL ANNUALIZED CHANGES						0.00	15,750	5,351	1,180	22,281

**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	49,427
1000	6047	66232	44503-GF	COMMUNITY HEALTH SPECIALIST 2	712989	(0.40)	(16,595)	(5,501)	(6,906)	(29,002)
1000	6352	66232	44503-GF	HEALTH EDUCATOR	712989	0.40	19,235	6,376	7,104	32,715
32244	6047	66232	4CA94-07-1	COMMUNITY HEALTH SPECIALIST 2	712989	(0.40)	(16,595)	(5,501)	(6,906)	(29,002)
32244	6352	66232	4CA94-07-1	HEALTH EDUCATOR	712989	0.40	19,235	6,376	7,104	32,715
1000	6086	65315	401601	RESEARCH/EVALUATION ANALYST 2	702028	(1.00)	(64,603)	(22,527)	(18,997)	(106,127)
1000	6087	65315	401601	RESEARCH/EVALUATION ANALYST/SR	702028	1.00	68,257	23,801	19,271	111,329
1000	6086	65315	401601	RESEARCH/EVALUATION ANALYST 2	714282	(1.00)	(64,603)	(21,416)	(18,997)	(105,016)
1000	6087	65315	401601	RESEARCH/EVALUATION ANALYST/SR	714282	1.00	66,190	21,942	19,116	107,248
1000	9670	64785	409300	HUMAN RESOURCES ANALYST 2	714917	(0.63)	(39,089)	(13,630)	(11,005)	(63,724)
1000	9748	64785	409300	HUMAN RESOURCES ANALYST, SENIOR	714917	0.63	42,998	14,993	11,298	69,289
TOTAL CURRENT FY CHANGES						0.00	14,430	4,913	1,082	20,425

FM Side			PS/CO Side			Cost Element/ Commitment		Notes
FM Fund Center	FM Fund Code	Functional Area	Internal Order	Cost Center	WBS Element	Item		
<b>General Fund Contingency</b>								
19	1000	0020		9500001000		60470		Reduce available General Fund Contingency
xx-xx	xxxxx	0020		xxx	xxx	xxxxx		Increase Expenditure
<b>Indirect</b>								
<b>Central</b>								
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
<b>Departmental</b>								
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
<b>Telecommunications</b>								
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
<b>Data Processing</b>								
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
<b>Electronic Service Reimbursement</b>								
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
<b>Motor Pool: Use this cost center if you are adding funds for motor pool use.</b>								
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
<b>Fleet: Use this cost center if you are adding funds for dedicated program cars.</b>								
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
<b>Building Management</b>								
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
<b>Insurance Service Reimbursement</b>								
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
<b>Lease Payments to Capital Lease Retirement Fund</b>								
xx-xx	xxxxx					60450		Departmental Capital Lease Retirement expenditure Contact your Budget Analyst to complete this.
<b>Mail &amp; Distribution</b>								
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
<b>Records</b>								
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.

<b>Functional Area Assignments ~ Based on Fund</b>		
<b><u>Special Revenue Funds</u></b>		
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
<b><u>Capital Project Funds</u></b>		
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
<b><u>Enterprise Funds</u></b>		
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.

<b>Functional Area Assignments ~ Based on Department (Fund Center)</b>		
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.***