



Multnomah County Agenda Placement Request Budget Modification

(Revised 9/23/13)

APPROVED: MULTNOMAH COUNTY
BOARD OF COMMISSIONERS
AGENDA # C 2 DATE 3/5/15
LYNDA GROW, BOARD CLERK

Board Clerk Use Only

Meeting Date: 3/5/15
Agenda Item #: C.2
Est. Start Time: 9:30 am
Date Submitted: 2/25/15

Agenda Title: BUDGET MODIFICATION # DCM-13-15: Reclassifying a Program Manager 1 to a Chief Appraiser in the DART Appraisal Section

Requested Meeting Date: March 5, 2015 Time Needed: Consent calendar

Department: 72 - County Management Division: Division of Assessment, Recording & Taxation

Contact(s): Randy Walruff (Shaun Coldwell)

Phone: 503-988-4668 Ext. 84668 I/O Address _____

Presenter Name(s) & Title(s): Not applicable

General Information

1. What action are you requesting from the Board?

The department is requesting Board approval of budget modification DCM-13-15 reclassifying a Program Manager 1 to a Chief Appraiser in the Division of Assessment, Recording and Taxation Division - Appraisal section.

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 modification reflects a Class/Comp decision on a classification request initiated by management (request# 2780). This is reclassifying an existing position in the FY 2015 adopted budget. The duties of this position have been evaluated and best reside under the non-represented classification-Chief Appraiser. Due to changes in DART's organizational structure, duties and responsibilities for this position has changed over time and this position is now responsible for the Commercial, Industrial, Personal Property, and Data Operations sections. The Program Manager responsible for the commercial section retired, work was transferred to this Program Manager 1, and two new program supervisor positions are reporting to this position. Duties include program development, including working with the DART Director in developing policy, implementing and evaluating programs and results, and overseeing compilation, analyses and audits of market and performance data; program management, including participating in developing the division-wide annual budget, reviewing and approving program budgets, and

forecasting and prioritizing funds for staffing and equipment; performance management, including recruiting, training, and evaluating program supervisors, appraisers and technical staff; appeals and complex issues, including acting as litigation coordinator, handling difficult appraisal and assessment issues and appeals with County executive management, Department of Revenue, professional staff, and litigants, recommending actions and resolutions, and responding to difficult and sensitive citizen inquiries and complaints; computer system, including determining technology needs and recommending enhancements to systems and files. The position is currently filled.

This reclassification is effective January 1, 2015.

The changes impact program offers 72031-15 Personal Property Assessment, 72032-15 Property Assessment Industrial and 72033-15 Commercial Property Appraisal.

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

This position is funded within existing resources (100% in General Fund). The reclassification request is adjusting pay retroactive to January 1, 2015 in the amount of \$3,635. The difference in salary and benefits is being offset by a decrease in the supplies budget. Ongoing, this increased cost will be absorbed by the program.

4. Explain any legal and/or policy issues involved.

None

5. Explain any citizen or other government participation.

None

Budget Modification

6. What revenue is being changed and why? If the revenue is from a federal source, please list the Catalog of Federal Assistance Number (CFDA).

Revenue to the Risk Fund is being increased by \$187.

7. What budgets are increased/decreased?

This position is changing allocations to program offers:

From:

60% to Program 72031-15 (Personal Property Cost Center 706404)

40% to Program 72032-15 (Industrial Assessment Cost Center 706407)

To:

20% to Personal Property #72031-15 Cost Center 706404

30% to Industrial Property #72032-15 Cost Center 706407

50% to Commercial # 72033-15 Cost Center 706403

8. What do the changes accomplish?

This action will approve the reclassification and pay adjustment for this position.

9. Do any personnel actions result from this budget modification?

The Program Manager 1 position is being reclassified to a Chief Appraiser, retroactive to January 1, 2015.

10. If a grant, is 100% of the central and department indirect recovered? If not, please explain why.

NA

11. 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?

NA

12. 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 (e.g. cash match, in kind match, reporting requirements, etc)?

Required Signature

**Elected Official or
Dept. Director:** Karyne Kieta /s/

Date: 2/24/15

Budget Analyst: Ching Hay /s/

Date: 2/24/15

Department HR: Patsy Moushey /s/

Date: 2/24/15

Countywide HR: Susan Mullett /s/

Date: 2/20/15

Exp/Rev/FTE - Budget Modification

Budget Year: 2015

Budget Modification: DCM-13-15

Expenditures & Revenues

An increase in revenue is shown as a negative value and a decrease as a positive value for consistency with SAP.

Line No.	Program Offer Number	Fund Code	Fund Center	Func. Area	Cost Object	Cost Element	Current Amount	Revised Amount	Change Increase/ (Decrease)	Subtotal
1	72020-15	3500	72-80	0020	705210	50316 - Svc Rmb Med/Dental	(67,728,774)	(67,728,961)	(187)	
2	72020-15	3500	72-80	0020	705210	60330 - Claims Paid	4,732,331	4,732,518	187	
3500 Total										0
72-80 Total										0
Program Offer Number 72020-15 Total										0
3	72031-15	1000	72-30	0020	706404	60000 - Permanent	551,230	533,731	(17,499)	
4	72031-15	1000	72-30	0020	706404	60130 - Salary Related Expns	179,555	173,626	(5,929)	
5	72031-15	1000	72-30	0020	706404	60140 - Insurance Benefits	190,048	185,949	(4,099)	
1000 Total										(27,526)
72-30 Total										(27,526)
Program Offer Number 72031-15 Total										(27,526)
6	72032-15	1000	72-30	0020	706407	60000 - Permanent	467,150	463,420	(3,731)	
7	72032-15	1000	72-30	0020	706407	60130 - Salary Related Expns	149,007	147,743	(1,264)	
8	72032-15	1000	72-30	0020	706407	60140 - Insurance Benefits	138,593	137,615	(978)	
1000 Total										(5,973)
72-30 Total										(5,973)
Program Offer Number 72032-15 Total										(5,973)
9	72033-15	1000	72-30	0020	706403	60000 - Permanent	895,572	919,377	23,806	
10	72033-15	1000	72-30	0020	706403	60130 - Salary Related Expns	290,836	298,901	8,065	
11	72033-15	1000	72-30	0020	706403	60140 - Insurance Benefits	268,213	273,477	5,264	

Exp/Rev/FTE - Budget Modification

Budget Year: 2015

Budget Modification: DCM-13-15

Line No.	Program Offer Number	Fund Code	Fund Center	Func. Area	Cost Object	Cost Element	Current Amount	Revised Amount	Change Increase/ (Decrease)	Subtotal
12	72033-15	1000	72-30	0020	706403	60240 - Supplies	28,559	24,924	(3,635)	
1000 Total										33,500
72-30 Total										33,500
Program Offer Number 72033-15 Total										33,500

Exp/Rev/FTE - Budget Modification

Budget Year: 2015

Budget Modification: DCM-13-15

Annualized Personnel Changes

Change is shown on a full year basis even though this action affects only a part of the fiscal year (FY).

							Annualized			
Position Number	JCN	JCN Description	HR Org	Fund	Cost Object Number	FTE	Base Pay (60000)	Fringe (60130)	Insurance (60140)	Total
712355	9615	Program Manager 1		1000	706404	(0.60)	(54,042)	(18,309)	(12,409)	(84,761)
712355	9615	Program Manager 1		1000	706407	(0.40)	(36,028)	(12,206)	(8,273)	(56,507)
712355	9630	Chief Appraiser		1000	706403	0.50	47,611	16,131	10,528	74,269
712355	9630	Chief Appraiser		1000	706404	0.20	19,044	6,452	4,211	29,708
712355	9630	Chief Appraiser		1000	706407	0.30	28,567	9,678	6,317	44,562
Total Annualized Changes:						0.00	\$5,152	\$1,745	\$374	\$7,271

Current Year Personnel Changes

Cost/savings that will take place in this FY; these explain the actual dollar amounts being changed by this BudMod.

							Current Year			
Position Number	JCN	JCN Description	HR Org	Fund	Cost Object Number	FTE	Base Pay (60000)	Fringe (60130)	Insurance (60140)	Total
712355	9615	Program Manager 1		1000	706404	(0.30)	(27,021)	(9,155)	(6,205)	(42,380)
712355	9615	Program Manager 1		1000	706407	(0.20)	(18,014)	(6,103)	(4,136)	(28,254)
712355	9630	Chief Appraiser		1000	706403	0.25	23,806	8,065	5,264	37,135
712355	9630	Chief Appraiser		1000	706404	0.10	9,522	3,226	2,106	14,854
712355	9630	Chief Appraiser		1000	706407	0.15	14,283	4,839	3,158	22,281
Total Current FY Changes:						0.00	\$2,576	\$873	\$187	\$3,635