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AGENDA COVER MEMORANDUM

AGENDA DATE: February 9, 2005

PRESENTED TO: Board of County Commissioners

PRESENTED BY: Cindy Tofflemoyer, Human Resources Analyst

AGENDA TITLE: **IN THE MATTER OF CREATING THE CLASSIFICATION AND SALARY RANGE FOR BUDGET/FINANCIAL PLANNING MANAGER**

I. MOTION

MOVE APPROVAL OF ORDER 05-_____/IN THE MATTER OF CREATING THE CLASSIFICATION AND SALARY RANGE FOR BUDGET/FINANCIAL PLANNING MANAGER

II. ISSUE

There is a need to establish a new classification in County Administration. The classification is responsible for managing and directing the development, administration and presentation of the County's annual and supplemental budget documents. The classification also provides highly credible complex countywide budget and financial planning information to the Budget Committee and Board of Commissioners. As well as actively participating in the development and administration of countywide budget and financial policies.

III. DISCUSSION

A. Background

This classification accurately reflects the responsibilities and work of the position currently providing these functions. This classification's primary focus is to work strategically with elected officials, Budget Committee and county department directors and managers to construct budget documents and financial planning, which holds Lane County government accountable to its citizens. A large component of the classification includes developing,

compiling and coordinating countywide budget information and providing expert analysis of internal and external trend information, which is provided to county policy makers as a tool for financial and strategic decision-making.

B. Analysis

1. Human Resources (HR) conducted an internal equity analysis, examples of other grade 47 classifications are; Assistant County Counsel 4, Assistant Director Health & Human Services, Financial Services Manager, Intergovernmental Relations Manager and Land Management Manager. All of these classifications have management responsibility for either large programs or programs that impact countywide operations.
2. HR conducted a survey of our comparator counties, finding a county with a comparable scope of duties proved difficult. The proposed Budget/Financial Planning Manager classification falls between Marion County's Chief Budget Analyst classification (\$48,526-\$68,269) and Marion County's Business Services Director classification (\$64,605-\$86,611) in both scopes of duties and salary.
3. Budget: This new classification will not require an additional FTE in County Administration; the department is funding the increased cost through savings from other under filled CAO analyst positions.

C. Alternatives/Options

1. Adopt the proposed classification and salary range as described above.
2. Reject the motion.

D. Recommendation

Approve Option to establish the proposed classification and salary range for the Budget/Financial Planning Manager classification.

Budget/Financial Planning Manager

Grade 47 (\$58,490-\$81,016)

IV. IMPLEMENTATION/FOLLOW-UP

Following Board action, Human Resources staff will update the classification and compensation plans by inserting the new classification, and reclassify the current Sr. Management Analyst.

V. ATTACHMENT

Board Order

Budget/Financial Planning Manager classification specifications

IN THE BOARD OF COUNTY COMMISSIONERS OF LANE COUNTY, OREGON

**RESOLUTION AND
ORDER 05-**) **IN THE MATTER OF CREATING THE**
) **CLASSIFICATION AND SALARY**
) **RANGE FOR BUDGET/FINANCIAL**
) **PLANNING MANAGER**

WHEREAS, Human Resources has completed a review and point factor of the proposed Budget/Financial Planning Manager classification; and

WHEREAS, it is the intent of Lane County to properly classify positions with regard to duties and compensation; and

WHEREAS, changes to the classification and compensation plans require board approval; now, therefore,

IT IS HEREBY RESOLVED AND ORDERED, that there be created the new classification of Budget/Financial Planning Manager:

Budget/Financial Planning Manager Range 47 (\$58,490-\$81,016)

Dated this _____ day of _____, 2005.

Anna Morrison Chair
Lane County Board of County Commissioners

APPROVED AS TO FORM
Date 2/1/05 Lane County
Teresa Allen
OFFICE OF LEGAL COUNSEL

AGENDA DATE: FEBRUARY 9, 2005

(CC) ORDER _____ / IN THE MATTER OF CREATING A
CLASSIFICATION AND SALARY RANGE FOR BUDGET/FINANCIAL
PLANNING MANAGER

Budget/ Financial Manager
Draft January 2005

BUDGET/FINANCIAL PLANNING MANAGER DRAFT

DEFINITION

Manages, directs, administers and participates in the development and presentation of the County's annual and supplemental budget documents. Assists in the development and administration of countywide budget and financial planning policies. Responsible for providing highly credible countywide budget and financial planning information to Elected Officials, Budget Committee, Board of Commissioners and Department Directors. Performs related activities including managing highly complex projects directed toward improving the efficient attainment of countywide objectives and goals. Provides professional and strategic analysis and counsel on complex fiscal financial planning issues to the County Administrator, Board of Commissioners, Budget Committee, Department Directors and others, and related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives policy direction from the Board of County Commissioners and the Budget Committee.

Receives administrative direction from the County Administrator.

Exercises direct supervision over assigned professional and technical personnel.

EXAMPLES OF DUTIES- Duties may include, but are not limited to the following:

Directs the development and administration of the County budget; directs the forecasting of needed funds.

Routinely provides County Administrator and Board of Commissioners with recommendations, which impact departments countywide.

Develops and recommends goals and objectives, assists in the development and implementation of policies and procedures; explains and interprets County policy to staff and the public.

Evaluates the effectiveness of countywide operations, programs, procedures, fiscal planning and services; modifies strategies to achieve goals.

Responsible for the selection, supervision and evaluation of assigned staff. Plans, prioritizes, assigns, monitors flow and project status; reviews and evaluates work projects, methods and procedures; modifies as necessary.

Investigates complaints; recommends and administers corrective action.

Budget/ Financial Manager

Draft January 2005

Provides countywide consultation and recommendations on matters concerning changes, updates and maintenance of the budget system to ensure the integrity of the system.

Provides highly responsible budget and financial planning analysis, consultation, and recommendations to Elected Officials, Budget Committee, Board of Commissioners and Department Directors.

Resource for departments in compiling and analyzing budget data.

Researches and prepares complex reports on financial issues such as new revenue, strategic planning and economic forecasts.

Responds to requests for information, makes presentations and offers recommendations to elected officials, committees, and management teams on difficult and politically sensitive issues.

Monitors countywide revenues and expenditures; prepares and presents midyear budgetary adjustments.

Analyzes organizational issues, and manages staff who are involved in providing complex countywide consultative and technical support and development for Countywide strategic planning and performance measure activities.

Reviews current Federal, State and local legislation; monitors federal and state grants, and if judged necessary, recommends specific actions to mitigate or alter countywide budget plans.

Periodically reviews and recommends change to financial policies and practices, and budget procedures.

Manages and participates in the planning and direction of the development of a variety of individual and group trainings on budget methods and processes, countywide and departmental performance measurement, and interpretation of finance and budget laws and policies.

Prepares cost projections related to labor negotiations.

Research, analyze and deliver reports on management issues.

Monitors compliance with Oregon Local Budget Law and County financial policies during the budget process and after adoption. Prepares appropriate legal notices.

Budget/ Financial Manager
Draft January 2005

Participates in regional and state committees and task forces to promote and coordinate intergovernmental programs and practices, often representing the County or the County Administrator.

Acts in capacity of County Administrator in his absence.

MINIMUM QUALIFICATIONS

Knowledge of:

Principles and practices of governmental budgeting and budget control and administration.

Principles, practices and techniques of organizational and operational analysis, strategic planning, implementation, and evaluation techniques.

Federal, State and County laws and ordinances applicable to area of responsibility.

Principles of media and community relations.

Statistics and qualitative analytical technique.

Modern office procedures, methods and computer equipment.

Principles of supervision, training and performance management.

Research, reporting, revenue analysis and forecasting methods, techniques and procedures.

Principles and practices of project management.

Ability to:

Conduct complex research projects.

Analyze situations accurately and develop effective courses of action.

Effectively prepare and administer the County's budget.

Develop, institute and evaluate sound budgeting systems, practices and procedures.

Identify and respond to public, media, Board of Commissions, Budget Committee, executive management questions, issues and concerns.

Prepare clear and concise reports.

Budget/ Financial Manager
Draft January 2005

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with other department staff, County employees, elected officials, and the public.

Experience and Training

Training:

Equivalent to a Bachelor's degree from an accredited college or university with major course work in public or business administration or a related field.

Graduate level course work or Master's degree in above areas preferred.

Experience:

Six years of increasingly responsible experience in public administrative and budget analysis and administration, which includes two years supervision and project management responsibility.

An equivalent combination of experience and training that will demonstrate the required knowledge and abilities is qualifying.