

To: Finance Committee  
From: Bill Wick, Human Resources Analyst  
Date: November 15, 2023  
Subject: Accountant 3 – Finance

The Human Resources Department received a request on July 21, 2023 from Finance Director Dave Schmiedicke, through Treasury and Revenue Manager Craig Franklin, to recreate position #4797 of Accountant 3 (CG18, R10), currently occupied by Emily Anderson, as an Accountant 4 (CG18, R12) due to the position directing and leading large implementation projects, including overseeing training, testing, and implementation. Projects have included implementation of the property tax module with the City's Enterprise Resource Planning (ERP) system. This is the only Accountant position within the Treasury Section of the Finance Department and assignment of complex projects to the position improves efficiency and effectiveness within the work unit.

The class specification for the Accountant 1-4 series states

**... responsible professional accounting work preparing financial statements, conducting audits, analyzing expenditures, processing payroll, and and/or performing other related professional accounting activities and functions. Work requires broad-based accounting knowledge and is characterized by the exercise of judgment and discretion...** Unless specifically indicated, this series is structured to provide advancement from Accountant 1 to Accountant 2 and Accountant 2 to Accountant 3, as a function of the employee's career development and generally occurs after two years at each level. **Progression to an Accountant 4 is not automatic, but rather is dependent upon the incumbent taking on additional duties and responsibilities as well as the needs of the department** and is generally accomplished through competition or a position study. [emphasis added]

The class specification for Accountant 3 states

**... the limited program supervisor level and/or advanced project level of the professional Accountant series.** Under the general supervision of a higher manager, employees at this level supervise specific City accounting functions of limited scope and/or perform a wide variety of high level professional accounting projects or assignments. Employees may lead lower-level staff in the completion of projects but are not formal supervisors. [emphasis added]

The class specification for Accountant 4 states

**... the advanced program supervisor level of the professional accountant series.** Employees at this level develop and supervise major City Accounting functions. **This level is distinguished from the Accountant 3 level in that employees' function with a higher degree of independence (i.e. receive less supervision), the work is more developmental in nature (as opposed to administrative), and employees are delegated greater authority in developing and implementing complex accounting programs.** Employees typically supervise professional, paraprofessional, and/or clerical employees and their work products. [emphasis added]

The main distinctions between an Accountant 3 and Accountant 4 are that an Accountant 4 performs work that is more developmental than administrative in nature, with greater independence, and typically supervises lower-level staff. This position directly supervises one

Accounting Technician 3 (CG20, R16), two Account Clerk 3s (CG20, R11), and two Administrative Clerk 1s (CG20, R09). The position description indicates that this position spends approximately 40% of its time serving as the subject matter expert for the City's ERP cashiering, business licensing, and property tax system, including liaising between the City's IT and Finance departments, Tyler Technologies (ERP vendor), and other outside vendors; and preparing procedures, policies, and training documentation. The position spends another 15% of its time serving as the Payment Card Industry liaison between the City's IT and Finance departments and the third party assessor. This position requires thorough knowledge of professional accounting theory, principles, and practices, as well as thorough knowledge of computer software and accounting systems.

Because this position is developing accounting procedures, policies, and training documentation and supervising multiple permanent full-time paraprofessional and administrative positions, I recommend that position #4797 of Accountant 3 be recreated in the Finance Department operating budget as an Accountant 4.

The necessary resolution has been prepared to implement this recommendation.

Editor's Note:

Compensation Group/Range	2023 Annual Minimum (Step 1)	2023 Annual Maximum (Step 5)	2023 Annual Maximum (+12% Longevity)
18/10	\$76,402.30	\$91,821.86	\$102,840.48
18/12	\$83,522.40	\$100,833.46	\$112,933.48

Cc: Dave Schmiedicke, Finance Director  
 Craig Franklin, Treasury Revenue Manager  
 Erin Hillson, Human Resources Director  
 Emaan Abdel-Halim, HR Services Manager