

TO: Personnel Board

FROM: Sarah Olson, Human Resources

DATE: 20 January 2015

SUBJECT: Administrative Analyst 3- Finance

At the request of Finance Director David Schmiedicke, I conducted a position study of the Administrative Analyst 3 (CG18-10) currently occupied by Elizabeth York in the Finance Department. The request for this study was based on an increase in responsibility managing the technical budget process in the City's financial software, including oversight of the compilation and presentation of financial data. Upon reviewing the position description and meeting with Mr. Schmiedicke, I recommend a reclassification of position #774, Administrative Analyst 3 currently held by E. York to Administrative Analyst 4, (CG18-12) for the reasons outlined in this memo.

The analysis of this position study included a review of the class specification for Administrative Analyst 4 (see attached) which shows:

...advanced-level of the professional Administrative Analyst series. Employees at this level are consistently assigned to projects with major financial and policy-level implications, incorporating complex long-term planning considerations, and the coordination of inter-agency group efforts. Work is performed with considerable independence in areas where there are often not clear policy/procedural parameters. Work may include providing leadership, advice and consultation on a project basis. Work is performed under the general supervision of the Budget and Audit Manager and/or higher level officials.

Ms. York was reclassified to an Administrative Analyst 3 in 2012. The Finance Department has three Administrative Analysts. Two Administrative Analyst 4's and Ms. York as an Administrative Analyst 3. Each Analyst is assigned different City agencies as the department's budget liaison and contact for all budgetary related questions. This is similar to the structure in Human Resources where a HR Analyst is assigned to assist a set of City agencies as their strategic HR partner. Some agencies are more complex and time consuming than others with their budgetary needs. Parks is a larger, more complex agency that was assigned to Ms. York in May of 2013. The budget for Parks is complex in that Parks has one enterprise agency (golf) as well as a large capital and operating budget. Ms. York is assigned to the Emerald Ash Borer (EAB) taskforce and has also taken over the Police department, the Attorneys Office and miscellaneous items under the Mayor's Office control. Duties include writing fiscal notes and aiding with the writing of department resolutions. Ms. York is responsible for the writing of budget and financial reports and technical budget instructions for use by her assigned agencies.

In addition to being assigned more complex agencies to support, Ms. York has taken the lead on the training and oversight of ERP, budget publications and ensuring all employees receive ERP and Tyler training on the budget process. She was the ERP Budget Coordinator and lead person for that project. While the initial implementation of the Tyler ERP system will soon end, there will continue to be ongoing responsibility for the system.

In addition to budgetary duties, a portion of Ms. York’s position involves assisting in the City’s internal audit function, including preparation and other assistance to the City’s independent auditors during the annual financial audit. Upon filling of a new position of Internal Auditor that was approved in the 2015 budget, Ms. York will work with this position in audits and continue to serve a back-up role as Auditor. As the Auditor will be an Accountant 4, in CG18, R12, it is appropriate that the backup be classified at a similar level.

According to the class specification, the Administrative Analyst 4 conducts and participates in varied and highly complex multi-faceted management audits, program evaluations and special studies regarding long-term planning considerations, departmental operations, budgets, budget requests and general City finances and revenues.

Based on the addition of more complex agencies to serve as their Budget Analyst, serving on the EAB taskforce and the lead and continued coordination of the ERP budget process, I recommend the reclassification of Administrative Analyst 3, position #774 in CG18, Range 10, be recreated as an Administrative Analyst 4 in Range 12.

The necessary resolution to implement this recommendation have been drafted.

Editor’s Note:

Compensation Group/Range	2015 Annual Minimum (Step 1)	2015 Annual Maximum (Step 5)	2015 Annual Maximum +12% longevity
18/10	\$61,215	\$73,569	\$82,397
18/12	\$66,919	\$80,790	\$90,484

cc: David Schmiedicke-Finance Director
Mike Lipski – HR Services Manager