

TO: Personnel Board

FROM: Emaan Abdel-Halim, Human Resources

DATE: 20 June 2019

SUBJECT: Administrative Analyst 2 – CDA Housing Operations Division

At the request of the provisional Housing Operations Program Manager, Mr. Tom Conrad; and the Housing Operations Analyst, Ms. Lisa Daniels, a position study was conducted of the Accounting Technician 2 position (#1029; CG 20, Range 14) currently occupied by Ms. Deborah Rakowski. After meeting with Ms. Daniels, the position's supervisor, as well as the incumbent; and upon review of the updated position description, I recommend the following for the reasons outlined in this memo:

- Recreate position #1029 of Accounting Technician 2 as an Administrative Analyst 2 in Comp Group 18, Range 8; and
- Fill the new Administrative Analyst 2 position through an internal competitive process. The incumbent will continue to underfill position #1029 as an Accounting Technician 2 until the conclusion of the competitive process.

This position study was conducted to fully evaluate and review the fiscal responsibilities of the CDA Housing Operations Division; and determine the appropriate classification for this work. In June 2016, the previous Housing Operations Program Manager, Mr. Augustine Olvera retired from the position. During his tenure, he maintained full responsibility of the \$24 million of federal funding and the financial reporting and record keeping of the division. Upon his retirement, the PCED Director, Ms. Natalie Erdman, reassigned many housing financial responsibilities to the provisional manager, the Housing Operations Analyst, and the Accounting Technician 2 for technical assistance in preparing both capital and operating budgets and the federal grant reporting requirements.

First, an excerpt from the classification specification for the Accounting Technician 2 describes the work as:

... journey-level **paraprofessional accounting work** in the **development and reconciliation of accounting records/reports**, and/or the **administration of accounting-related programs**. Under the general supervision of a professional Accountant, employees **exercise judgment and discretion** in the completion of assigned tasks. Work is normally performed with a **high degree of independence within established guidelines**. [emphasis added]

By January 2017, the Accounting Technician 2 was assigned to administer the ROSS (Resident Opportunities and Self Sufficiency) and MFH (Multi-Family Housing) Service Provider grants. These are both federal grant programs administered by the Federal agency Housing and Urban Development (HUD), and require strict adherence to regulations and reporting oversight. As a result, the Accounting Technician 2 holds regular meetings with the CDA's public housing site managers to determine which funds can be used for specific services and the details related to how to administer the funds accordingly. This requires extensive tracking of grant related

expenses to make sure funding sources are not co-mingled and adhere to the strict requirements of each grant program. In addition to the grants administration responsibilities, this position makes sure the HUD grant allocation are used or 'drawn down' at appropriate increments to ensure continued availability of the federal funds.

In late 2017, Ms. Rakowski was assigned asset management of the CDA Redevelopment Authority portfolio of residential rental properties, including oversight of third-party property management contracts and Section 42 Tax Credit compliance. At that time, HUD also performed a compliance monitor review of the City's Section 8 and Public Housing programs, which entailed an onsite visit, extensive interviews, and an audit of the programs policies, procedures and records. The HUD review presented several findings with areas of concern for lack of consistent, defined policies and procedures for procurement/ purchasing, disposition of assets, capitalization, and cost allocations. Specifically the applications of such policies was inconsistent from site to site across the CDA Public Housing portfolio of properties. With her background and upon attending HUD trainings, Ms. Rakowski analyzed the complex program guidelines and developed the lacking policies to comply with federal regulations. For example, now the division has central oversight of procurement for the properties, with a procedure for the request for quotes/bids process and writing contracts that most effectively meet the agency needs across the division. Also by working with the site managers, this position created an asset management system to improve accounting accuracy, and in turn a better budgeting process. With this position's greater depth of understanding, the division's managers now can more accurately forecast their specific budget needs and better plan projects accordingly. The Housing Division has identified this higher-level work as an ongoing need within the division to ensure appropriate tracking and monitoring of the federal dollars.

Now a review of the classification specification for the Administrative Analyst 2 describes the work as:

... **objective-level** of the professional Administrative Analyst series. **Work is performed independently** within applicable policy and procedural guidelines. Employees are assigned varied and **responsible analytic activities and prepare substantive study recommendations for policy body consideration...** [emphasis added]

Additional duties in this classification include:

Conduct or **participate in varied and complex management audits, program evaluations and special studies regarding departmental operations, budgets, budget requests, and general City finances and revenues.**

Provide expertise and advice on a wide variety of related management activities and initiatives.

Analyze existing and proposed City programs and services. Make and defend substantive recommendations on the possible reallocation of existing and/or potential resources. Prepare draft and/or final recommendations for incorporating diverse factors. [emphasis added]

As part of this position study, I consulted with the City's Budget and Program Evaluation Manager, Ms. Laura Larsen, to review the work performed by this position for consistency with this

classification. The Administrative Analyst classification series is part of the Finance Department, with the positions serving as the key program and budget analyst for their respective assigned city agencies. This is professional analytic work primarily in the areas of economic, financial and policy analysis, and in the development and administration of City agency budgets. As the classification specifications for this series state, the Administrative Analyst I performs analytical work of relatively limited scope, in conjunction with an experienced analyst, and with the work reviewed closely by senior staff. At the Administrative Analyst 2 level, the work is performed with greater independence and assignments are varied and more complex. Ms. Larsen agreed that the nature of the work described is consistent with the expectations and responsibilities of the Administrative Analyst series.

In considering the reclassification of this position as an Administrative Analyst, I find the CDA Housing division has an ongoing need to fulfill a high level of fiscal requirements, including complex and federal reporting and tracking; as well as preparing and monitoring the agency’s complicated budgets. Based on this comparison, the development of the job duties, and the higher degree of discretion and independence, this position’s placement would be appropriate as an Administrative Analyst 2.

As determined by the findings of this position study, I recommend the position of Accounting Technician 2 in the CDA Housing budget be recreated as an Administrative Analyst 2, in CG18, Range 8. However, as the Personnel Rules prohibit reclassification from one compensation group to another, the recreated position will be posted to CDA Housing Operations for internal competition, with the incumbent underfilling the position in the meantime.

The necessary resolution to implement these recommendations has been drafted.

Editor’s Note:

| Compensation Group/Range | 2019 Annual Minimum (Step 1) | 2019 Annual Maximum (Step 5) | 2019 Annual Maximum (+12% longevity) |
|--------------------------|------------------------------|------------------------------|--------------------------------------|
| 20/14 | \$ 52,782 | \$ 58,546 | \$65,571 |
| 18/08 | \$ 63,911 | \$ 75,840 | \$ 84,941 |

- cc: Nan Fey – Interim Director of Planning, Community and Economic Development
- Tom Conrad – Interim Housing Operations Program Manager
- Lisa Daniels – Housing Operations Analyst
- Michael Lipski – Human Resources Services Manager
- Greg Leifer – Employee and Labor Relations Manager