



## Request for City Council Committee Action from the Department of Human Resources

**Date:** July 29, 2015  
**To:** Mayor Betsy Hodges and the Executive Committee  
**Referral to:** Ways and Means Committee  
**Subject:** New Appointed Position: Director Budget  
Grade 13/588 points \$98,266 to \$116,487

**Recommendation:**

1. Find that the proposed position meets the criteria in Section 20.1010, Council to Establish (Appointed) Positions, as follows:
  - (1) The person occupying the position will report to the head of the designated city department or the designated city department head's deputy.
  - (2) The person occupying the position will be part of the designated department head's management team.
  - (3) The duties of the position involve significant discretion and substantial involvement in the development, interpretation, or implementation of city or department policy.
  - (4) The duties of the position do not primarily require technical expertise where continuity in the position would be significant.
  - (5) The person occupying the position needs to be accountable to, loyal to, and compatible with the mayor, the city council, and the department head.
2. Approve the new proposed position: Director Budget evaluated at 588 total points and allocated to Grade 13.
3. Approve the recommended salary schedule for the position, with a range of \$98,266 to \$116,487, effective August 9, 2015, and authorize annual step movement for the incumbent provided satisfactory or better performance in the job:

Title	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
<u>Director Budget</u>	\$98,266	\$103,437	\$105,506	\$107,616	\$109,769	\$111,964	\$114,203	\$116,487

4. Refer to Ways and Means

**Prepared or Submitted by:** Pamela Nelms, CCP, SPHR

Human Resources Senior Consultant/Compensation; 673-3344

**Approved by:**

\_\_\_\_\_  
Patience Ferguson  
Chief Human Resources Officer

\_\_\_\_\_  
Spencer Cronk  
City Coordinator

**Presenters in Committee: Sandra Christensen, Deputy Finance Officer/Director Enterprise Finance, Management and Budget, & Pamela Nelms, HR Senior Consultant**

**Financial Impact** (Check those that apply)

No financial impact (If checked, go directly to Background/Supporting Information).

Action requires an appropriation increase to the \_\_\_\_ Capital Budget or \_\_\_\_ Operating Budget.

Action provides increased revenue for appropriation increase.

Action requires use of contingency or reserves.

Business Plan: \_\_\_\_ Action is within the plan. \_\_\_\_ Action requires a change to plan.

Other financial impact (Explain):

Request provided to department's finance contact when provided to the Committee Coordinator.

### **Background/Supporting Information**

Dear Mayor Hodges:

The Deputy Finance Officer has requested that the Director Budget be reviewed based on a new set of duties and responsibilities. Responsibility for Finance and Property Services Department management and coordination previously present in the position has been moved to the Deputy CIO position. Whereas the Budget Director historically supervised other Director positions and had authority over their activities, it now will supervise the Financial Analyst staff in Finance and Property Service Department. The position will be responsible for management and coordination of all aspects of the budget process. It will lead and coordinate long-term financial projections.

The proposed duties for the position are as follows:

- Advise the Mayor, Council and staff regarding the impact of financial decisions and financial aspects of policy decisions.
- Evaluate data and prepare recommendations for the Mayor, Council, and staff on financial decisions and financial aspects of budget-related matters to assist them in fulfilling their respective roles and responsibilities and achieving objectives.
- Establish a process that incorporates the priorities of elected officials and assigns responsibility for adherence to these policies within budget guidelines.

- Assess changing financial conditions and incorporate them into longer-term financial projections and planning so that elected officials may be advised in their decision-making.
- Coordinate, oversee and review staff responsibilities during the annual budget process.
- Lead and coordinate cross-functional staff and related efforts to achieve specific project goals to further enterprise goals and strategic directions.
- Train and coach managers and supervisors on analytical and system skills needed in the budget process to improve quality of financial information.
- Reply to factual or policy questions, respond to requests for research, discuss office management, communicate budget policies, and determine the direction of special projects.
- Update and develop financial policies and guidelines for consistent practices throughout the division and enterprise.
- Collaborate with accounting staff to improve accounting transaction processes to promote greater efficiency, ease of understanding and meaningfulness of data produced, and resolve budget disputes.
- Provide sound financial planning and advice to Department Heads, Mayor and City Council
- Develop, maintain, and enhance budget documentation to meet Government Finance Officers Association (GFOA) standards and effectively communicate to management, elected leadership and the public.

**Factor Summary of the evaluation of the position**

Factor	Points	Analysis
<b>Pre-requisite Knowledge</b>	70	The position requires Bachelor’s Degree in Finance, Business Administration, Public Policy, a related field or equivalent (CPA or Advanced Degree preferred). It requires five years of professional experience in State or local budgeting and policy analysis, with a minimum of two years of experience in program development and administration. A CPA or Advanced Degree is preferred.
<b>Decisions and Actions</b>	65	Jobs at this level serve in a supervisory level staff or analytical capacity. The majority of these jobs are appointed. Performance has considerable influence on finances or delivery of services; errors or inadequacies would cause very serious and notable inconvenience, embarrassment or expense. Work is done under general supervision in accordance with broadly stated policies or principles. Most work is of an advanced nature and calls for the exercise of independent judgment. Decisions and actions are subject to prior approval only in unusual cases or where considerable expense is involved.  The position will be responsible for management and coordination of all aspects of the budget process; and for leading and coordinating long-term financial projections for the City enterprise; It will provide elected officials and department heads with assistance needed to appropriately allocate City resources and evaluate the effectiveness and efficiency of City operations in an informed manner. It will evaluate data and prepare recommendations for the Mayor, Council, and staff on financial decisions and financial aspects of budget-related matters to assist them in fulfilling their respective roles and responsibilities and achieving objectives. The position will make personnel decisions in its supervisory role over the City’s Financial Analysis function.
<b>Supervisory Responsibility</b>	10	The position will supervise four Senior Financial Analyst positions and one Enterprise Financial Specialist. These positions will also be indirectly providing work direction to other city staff.

Factor	Points	Analysis
<b>Relationships Responsibility</b>	65	Jobs at this level are responsible for creating and maintaining effective relationships that are essential to the success of the job function and that require the use of tact and diplomacy in dealing with important matters, such as budgeting and financial information. These are high-level professional, managerial, and/or director level jobs which are called on to deal with sensitive and important matters on a frequent basis. This level requires highly developed communications skills and very strong interpersonal skills.
<b>Working Conditions</b>	20	The position will work in normal office environment and will have exposure to the typical equipment in an office including computer keyboarding, copiers, and phones.
<b>Effort</b>	65	At this level the job is a manager with wide ranging responsibilities that require considerable mental effort. These jobs are responsible for planning, organizing and managing in more complex areas, dealing with setting priorities, and ensuring compliance with City goals and objectives. There is pressure to meet expectations, and pressures driven by budget, project related deadlines, responsiveness to elected officials, and other constituencies, and in making recommendations to higher-level managers and officials.

Attached: Classification Report and Salary Ordinance