

REQUEST FOR BUDGET ADJUSTMENT

15.5

Executive Summary

Reference No: 790100IA01 For Fiscal Year: 2017
 Requesting Organization: 79010000 ELECTION CLERK Date of Request: 8-Feb-17
 Budget Adjust Type(s): Appropriation Unit Shift One Time Change (Y or N): Y
 If No, next year's impact: \$0
 Net FTE Change: 0.00

Description and Justification:

Agilis Sorting Machine U-Turn Pockets: In 2016, the Election Division implemented the Agilis machine which greatly increased efficiency and timeliness in processing the by mail ballots by sorting and giving vote history to voters. Throughout that election cycle we realized that we need to add more bins to allow for sorting ballots to a deeper level. We need the ability to sort by legislative district or by city depending upon the election without the

Fund Impact

SUMMARY OF FUND IMPACT BY FUND	
FUND:	110 GENERAL FUND
Fund Impact (Budgetary)	\$0
Fund Impact (Transfers)	\$0
TOTAL FUND IMPACT	\$0

SUMMARY OF CNTY FUNDING IMPACT BY DEPT				
DEPT	REVENUE	EXPENSE	BAL SHEET	CNTY FUNDING
TOTALS	0	0	0	0

Approvals

Division Director: Ryan Mitchell Date: 2/8/17
 Dept. or Elected Fiscal Mgr: Pamela Tucker Date: 2-8-17
 Dept. Dir. or Elected Official: Sherris Swann Date: 2-8-17
 Facilities Division Director: _____ Date: _____
 (Capital Projects Only)
 Chief Financial Officer: [Signature] Date: 2-8-17
 Approve [Signature]
 Mayor or Designee: [Signature] Date: 2/8/17
 Approve [Signature]
 Council Action: _____ Date: _____
 Approve

Budget Adjustment Detail

Budget Year: 2017 * Requesting Department: 79010000 ELECTION CLERK
 Budget Period: Pre-June Interim * Req Item No: 790100IA01 * Adjustment Title: Agilis Sorting Machine U-Turn Pockets
 Adjustment Type(s): Appropriation Unit Shift

Expense Budget String(s):

FUND	AGENCY	SUB-DEPT ID	EXPENSE ACCOUNT	PROG/ACT ID (OPT)	PROJECT ID (CAP)	AMOUNT
110	079	7901000000	613025			(50,000)
110	079	7901000000	679020			50,000
TOTAL EXPENDITURE CHANGE:						\$0

Revenue Budget String(s):

FUND	AGENCY	SUB-DEPT ID	REVENUE ACCOUNT	PROG/ACT ID (OPT)	PROJECT ID (CAP)	AMOUNT
TOTAL REVENUE CHANGE:						\$0

Balance Sheet String(s): ☐ Bal sheet strings only required for Proprietary Fund adjustments; check if applicable.

FUND	SUB-DEPT ID	BAL. SHEET ACCOUNT	AMOUNT
		BAL_SHT	
		BAL_SHT	
		BAL_SHT	
TOTAL BALANCE SHEET CHANGE:			\$0

* One Time Change (Y or N): Y
 If No, next year's impact:

No. of New FTEs: 0.00 (2)
 No. of New Time Limited FTEs: 0.00 (2)
 No. of Transferred FTEs: 0.00 (2)
 No. of Other FTEs: 0.00 (2)

Fund Balance Transfers:

From Fund	From Dept ID	To Fund	To Dept ID	Amount

Description and justification: (Attach additional pages as needed.)*

In 2016, the Election Division implemented the Agilis machine which greatly increased efficiency and timeliness in processing the by mail ballots by sorting and giving vote history to voters. Throughout that election cycle we realized that we need to add more bins to allow for sorting ballots to a deeper level. We need the ability to sort by legislative district or by city, depending upon the election, without the U-turn add-on this is not a viable option. The deeper sort levels will improve our ability to better manage ballots during the processing and in the event of a recount.

(1) If the request is for a grant, include the dates the grant will expire and what obligations are required of the County after the grant expires.

REQUEST FOR BUDGET ADJUSTMENT

156

Executive Summary

Reference No: 102000IA012
 Requesting Organization: 10200000 MAYOR ADMINISTRAT
 Budget Adjust Type(s): Technical
 For Fiscal Year: 2017
 Date of Request: 8-Feb-17
 One Time Change (Y or N): N
 If No, next year's impact: \$0
 Net FTE Change: 1.00

Description and Justification:

Reclassify Admin Assistant to Exempt Secretary : Requesting to Reclassify the Existing Administrative Assistant of the Community Services Department to Exempt Secretary which needs to be filled ASAP. The position is currently vacant.

Fund Impact

SUMMARY OF FUND IMPACT BY FUND


FUND:	110 GENERAL FUND
Fund Impact (Budgetary)	\$0
Fund Impact (Transfers)	\$0
TOTAL FUND IMPACT	\$0

SUMMARY OF CNTY FUNDING IMPACT BY DEPT

DEPT	REVENUE	EXPENSE	BAL SHEET	CNTY FUNDING
TOTALS	0	0	0	0

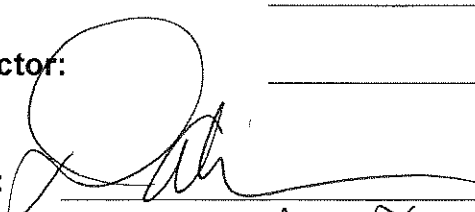
Approvals

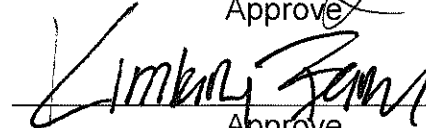
Division Director: _____ Date: _____

Dept. or Elected Fiscal Mgr:  (Janna) Date: 2/8/17

Dept. Dir. or Elected Official: _____ Date: _____

Facilities Division Director: _____ Date: _____
 (Capital Projects Only)

Chief Financial Officer:  Date: 2-8-17

Mayor or Designee:  Date: 2/9/17

Council Action: _____ Date: _____

Approve

Budget Adjustment Detail									
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Budget Year: 2017 *** Requesting Department:** 10200000 MAYOR ADMINISTRATION

Budget Period: * **Req Item No:** * **Adjustment Title:** Reclassify Admin Assistant to Exempt Secretary

Adjustment Type(s): Tec nical

Expense Budget String(s):

[illegible]

TOTAL EXPENDITURE CHANGE:	\$0
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Revenue Budget String(s):[illegible]

TOTAL REVENUE CHANGE:	\$0
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Balance Sheet String(s): ☐ Balance sheet string(s) required for Proprietary Fund adjustments; be if applicable.

FUND	SUB-DEPT ID	BAL. SHEET ACCOUNT	AMOUNT
		BAL_SHT	
		BAL_SHT	
		BAL_SHT	

TOTAL BALANCE SHEET CHANGE:	\$0
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<p>* One Time Change (Y or N): <u> N </u></p> <p>If No, next year's impact: <u> \$0 </u></p>	<p>No. of New FTEs: <u> 0.00 </u> (2)</p> <p>No. of New Time Limited FTEs: <u> 0.00 </u> (2)</p> <p>No. of Transferred FTEs: <u> 0.00 </u> (2)</p> <p>No. of Other FTEs: <u> 1.00 </u> (2)</p>
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Fund Balance Transfers:

[illegible]

Description and justification: (Attach additional pages as needed.)*

Requesting to Reclassify the Existing Administrative Assistant of the Community Services Department to Exempt Secretary which needs to be filled ASAP. The position is currently vacant.

(1) If the request is for a grant, include the dates the grant will expire and what obligations are required of the County after the grant expires.

Position Management Information

INSTRUCTIONS: Complete one section for each position. To facilitate efficient execution of HR actions, please complete ALL fields as requested. TO fields are required for all position actions while FROM fields only need to be entered for position transfers. Print pages for completed sections and attach to the budget adjustment form.

Position 1

Position Number (For changes to existing positions)		00000077	
Existing/Proposed Job Start Date		2/14/2017	
Existing/Proposed Job Code		471 to 043	
Existing/Proposed Job Title		Department Admin Assistant to Exempt Secretary	
Position Type: Full-Time (FT), Part-Time (PT)		FT	
Time Limited? Yes / No		No	
If Time Limited, expected expiration date			
Location Code (four digit number)		1183	
Fund	To: 110	From:	110
PS/BRASS Sub Department Id	To:	From:	
Reports To Position Number	083		
Reports To Job Title	Department Director Community Services		
FTE (Example: .50 / .75 / 1.0)	To: 1	1	
Action Type: (New position (N), New TL (TL), Reclassification (R), Transfer (T), FTE Change/Re-Allocation (RA), Abolish (A), Other (O))			

Position 2

Position Number (For changes to existing positions)			
Existing/Proposed Job Start Date			
Existing/Proposed Job Code			
Existing/Proposed Job Title			
Position Type: Full-Time (FT), Part-Time (PT)			
Time Limited? Yes / No			
If Time Limited, expected expiration date			
Location Code (four digit number)			
Fund	To:	From:	
PS/BRASS Sub Department Id	To:	From:	
Reports To Position Number			
Reports To Job Title			
FTE (Example: .50 / .75 / 1.0)	To:	From:	
Action Type: (New position (N), New TL (TL), Reclassification (R), Transfer (T), FTE Change/Re-Allocation (RA), Abolish (A), Other (O))			

Position 3

Position Number (For changes to existing positions)			
Existing/Proposed Job Start Date			
Existing/Proposed Job Code			
Existing/Proposed Job Title			
Position Type: Full-Time (FT), Part-Time (PT)			
Time Limited? Yes / No			
If Time Limited, expected expiration date			
Location Code (four digit number)			
Fund	To:	From:	
PS/BRASS Sub Department Id	To:	From:	
Reports To Position Number			
Reports To Job Title			
FTE (Example: .50 / .75 / 1.0)	To:	From:	
Action Type: (New position (N), New TL (TL), Reclassification (R), Transfer (T), FTE Change/Re-Allocation (RA), Abolish (A), Other (O))			

REQUEST FOR INTERIM/JUNE/YEAR-END BUDGET ADJUSTMENT

15.7

Executive Summary

Reference No: 230000FTE01	For Fiscal Year: 2017	
Requesting Organization: 23000000 AGING AND ADULT S	Date of Request: 2-Feb-17	
Budget Adjust Type(s): FTE/Position Reclass	One Time Change (Y or N): NO	
	If No, next year's impact: (\$7,259)	
	Net FTE Change: 0.00	

Description and Justification:

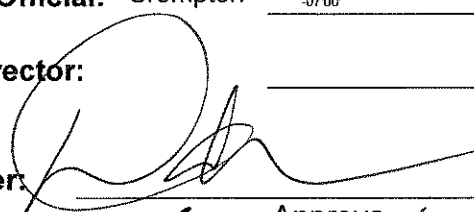
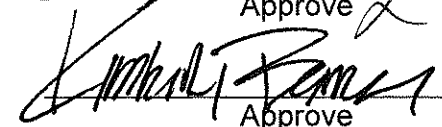
FTE Reclass Positions 2374 & 8380: To create a 1.0 FTE Outreach Caseworker 12 by combining 0.5 FTE from position # 2374 Center Program Assistant and 0.50 FTE from Position 8380 Secretary. The savings resulted from this request is \$7,259 in 2017.

Fund Impact

SUMMARY OF FUND IMPACT BY FUND	
FUND:	120 GRANT PROGRAMS FUND
Fund Impact (Budgetary)	\$0
Fund Impact (Transfers)	\$0
TOTAL FUND IMPACT	\$0

SUMMARY OF CNTY FUNDING IMPACT BY DEPT				
DEPT	REVENUE	EXPENSE	BAL SHEET	CNTY FUNDING
TOTALS	0	0	0	0

Approvals

Division Director:	Paul Leggett	<small>Digitally signed by Paul Leggett Date: 2017.02.03 09:39:15 -0700</small>	Date: _____
Dept. or Elected Fiscal Mgr:	Yanping Ding	<small>Digitally signed by Yanping Ding Date: 2017.02.03 09:43:15 -0700</small>	Date: _____
Dept. Dir. or Elected Official:	Karen Crompton	<small>Digitally signed by Karen Crompton Date: 2017.02.03 14:31:07 -0700</small>	Date: _____
Facilities Division Director: <i>(Capital Projects Only)</i>			Date: _____
Chief Financial Officer:		Approve	Date: 2/6/2017
Mayor or Designee:		Approve	Date: 2/6/17
Council Action:		Approve	Date: _____

Budget Adjustment Detail

Budget Year: 2017 * Requesting Department: 23000000 AGING AND ADULT SERVICES

Budget Period: Pre-June Interim * Req Item No: 230000FTE01 * Adjustment Title: FTE Reclass Positions 2374 & 8380

Adjustment Type(s): FTE/Position Reclass

Expense Budget String(s): *This adjustment involves a reclass; while the next year's financial impact may be presented, no actual budget adjustment is required.*

FUND	AGENCY	SUB-DEPT ID	EXPENSE ACCOUNT	PROG/ACT ID (OPT)	PROJECT ID (CAP)	AMOUNT
120	020	2300000700	601030			0

TOTAL EXPENDITURE CHANGE: \$0

Revenue Budget String(s):

FUND	AGENCY	SUB-DEPT ID	REVENUE ACCOUNT	PROG/ACT ID (OPT)	PROJECT ID (CAP)	AMOUNT

TOTAL REVENUE CHANGE: \$0

Balance Sheet String(s): ☒ Bal sheet strings only required for Proprietary Fund adjustments; check if applicable.

FUND	SUB-DEPT ID	BAL. SHEET ACCOUNT	AMOUNT

TOTAL BALANCE SHEET CHANGE: \$0

* One Time Change (Y or N): <u>No</u>	No. of New FTEs: <u>0.00</u> (2)
If No, next year's impact: <u>(\$7,259)</u>	No. of New Time Limited FTEs: <u>0.00</u> (2)
	No. of Transferred FTEs: <u>0.00</u> (2)
	No. of Other FTEs: <u>0.00</u> (2)

Fund Balance Transfers:

From Fund	From Dept ID	To Fund	To Dept ID	Amount

Description and justification: (Attach additional pages as needed.)*

To create a 1.0 FTE Outreach Caseworker 12 by combining 0.5 FTE from position # 2374 Center Program Assistant and 0.50 FTE from Position 8380 Secretary. The savings resulted from this request is \$7,259 in 2017.

(1) If the request is for a grant, include the dates the grant will expire and what obligations are required of the County after the grant expires.
 (2) For FTE related requests, complete and print the "Position" tab. Totals from that tab will be carried over to here.

Position Management Information					
Job Title:	[Redacted]				
Department:	[Redacted]				
Reporting Manager:	[Redacted]				
Start Date:	[Redacted]				
End Date:	[Redacted]				
Location:	[Redacted]				
Notes:	[Redacted]				

INSTRUCTIONS: Complete one section for each position. To facilitate efficient execution of HR actions, please complete ALL fields as requested. TO fields are required for all position actions while FROM fields only need to be entered for position transfers. Print pages for completed sections and attach to the budget adjustment form.

Position 1			
Position Number (For changes to existing positions)		2374; 8380	
Existing/Proposed Job Start Date			
Existing/Proposed Job Code		please refer to PDQ	
Existing/Proposed Job Title			
Position Type: Full-Time (FT), Part-Time (PT)			
Time Limited? Yes / No			
If Time Limited , expected expiration date			
Location Code (four digit number)			
Fund	To:	From:	
PS/BRASS Sub Department Id	To:	From:	
Reports To Position Number			
Reports To Job Title			
FTE (Example: .50 / .75 / 1.0)	To: 0	From:	0
Action Type: (New position (N), New TL (TL), Reclassification (R), Transfer (T), FTE Change/Re-Allocation (RA), Abolish (A), Other (O))		R	

CONDENSED POSITION DESCRIPTION QUESTIONNAIRE (CPDQ)

CLASSIFICATION REQUEST	
<i>Please complete this form, review with department/division personnel necessary for approval, obtain approvals, and forward to your HR consultant. In addition, please include your division's most recent Organization Chart.</i>	
This request is for a: Vacant to Existing Position	
Department Name: <u>Human Services</u>	Position Number: <u>00008380 & 00002374</u>
Division Name: <u>Aging and Adult Services</u>	Division Number: <u>2300000300</u>
Information Regarding Vacant Existing Allocation	
Current Job Title/Grade: <u>Secretary , Grade 10 .50 FTE & Center Program Asst., Grad</u>	Job Code: <u>400</u>
New Existing Title/Grade: <u>00008380 Outreach Case Worker(Vacant), Grade 13 increase from .50 FTE to 1.00 FTE</u>	

Agency Budget Impact:	
<input checked="" type="checkbox"/>	<p>1) There is no budget increase to this year or subsequent year's budgets resulting from this position classification change. Council review and an interim budget approval form will not be required. Please provide an explanation below:</p> <p>The Division is requesting to change the FTE % status of the following positions, and change to the existing job title: Position 00008380 Secretary .50 FTE to change the job title to Outreach Case Worker, and increase the FTE to 1.00, and decrease position 00002374 Centers Program Assistant from .50 FTE to 0.00 FTE.</p>
<input type="checkbox"/>	<p>2) There is an increase to this year or subsequent year's budgets. Council review and an interim budget approval form will be required. Below is a summary of the budget impact:</p>
<input type="checkbox"/>	<p>3) The budget impact for this classification change is unknown at this time. Upon completion of the job review, if it is determined that a budget increase will result from this classification change, budget approval will be obtained by the County Council and submitted to HR prior to finalizing any classification changes.</p>

Business Justification: Please provide a brief summary of the organization need or business justification for this position classification request.

The Division is requesting a reclassification of a vacant Secretary, Grade 10 position to an Outreach Case Worker effective April 1, 2017. The position will provide Case Work services to serve our Senior Centers in the Active Aging program. This will meet an important and growing need in our Active Aging program. Senior Centers are seeing increased demand for intensive case management needs. Patrons are coming in with complex needs, including homelessness, mental health, and elder abuse issues. Assigning a Case Worker to this program will deliver critical support for the most vulnerable center participants while providing Active Aging staff with important support and education. The job duties and responsibilities meet the job description of the Outreach Case Worker.

Department/Division Approval Signatures

By providing approval and electronically signing below, this certifies that processing this classification action does not have a negative impact on the current year's personnel budget. Any budgetary impact has already been addressed and approved by the Council, as needed.

Elected Official or Department Director	Approved: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Signature: Karen Crompton <small>Digitally signed by Karen Crompton Date: 2017.02.06 08:08:46 -07'00'</small>
Division Director/ Administrator	Approved: <input type="checkbox"/> Yes <input type="checkbox"/> No	Signature: Paul Leggett <small>Digitally signed by Paul Leggett Date: 2017.01.31 13:20:39 -07'00'</small>
Immediate Supervisor	Approved: <input type="checkbox"/> Yes <input type="checkbox"/> No	Signature: Jeremy Hart <small>Digitally signed by Jeremy Hart Date: 2017.01.31 07:55:50 -07'00'</small>
Immediate Supervisor's Title: <u>Jeremy Hart, Centers Program Manager</u>		
E-Mail: <u>JHart@slco.org</u>		Phone Number: <u>385-468-3258</u>

HR Consultant Contact Information

Consultant	E-Mail	Phone
Debbie Wine	dwine@slco.org	(385) 468-0574
Kirt Davis	ksdavis@slco.org	(385) 468-0588
Martinha Penrod	mpenrod@slco.org	(385) 468-0592
Ryan Speer	rspeer@slco.org	(385) 468-0590
Terry Fortner	tfortner@slco.org	(385) 468-0591

15.8

Executive Summary			
Reference No:	912000IA02	For Fiscal Year:	2017
Requesting Organization:	91200000 COUNTY JAIL	Date of Request:	7-Feb-17
Budget Adjust Type(s):	FTE/Position Reclass	One Time Change (Y or N):	N
		If No, next year's impact:	\$7,600
		Net FTE Change:	0.00
Description and Justification:			
<p>Reclassification Request 2 FTE's: This request is for the reclassification of two positions. Reclassification of an Accounting Specialist FTE to a Fiscal Coordinator FTE. The difference in Salary & Benefits for this change is an increase of \$7600 annually. Reclassification of a Secretary FTE to an Office Coordinator FTE. There is no budget impact to this change due to the level of funding for the prior incumbent and the new Salary structure. Both of these changes are requested to accurately reflect current job duties. Both of these changes can be managed within the current year budget and will not require a budget adjustment. The effect on subsequent years budget should be mitigated due to attrition in various positions within the Sheriff's Office.</p>			

Fund Impact	
1	2
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47	48
49	50
51	52
53	54
55	56
57	58
59	60
61	62
63	64
65	66
67	68
69	70
71	72
73	74
75	76
77	78
79	80
81	82
83	84
85	86
87	88
89	90
91	92
93	94
95	96
97	98
99	100

FUND:	110 GENERAL FUND
Fund Impact (Budgetary)	\$0
Fund Impact (Transfers)	\$0
TOTAL FUND IMPACT	\$0

DEPT	REVENUE	EXPENSE	BAL SHEET	CNTY FUNDING
TOTALS	0	0	0	0

Approvals	
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Council Action: _____ **Date:** _____

Position Management Information

INSTRUCTIONS: Complete one section for each position. To facilitate efficient execution of HR actions, please complete ALL fields as requested. TO fields are required for all position actions while FROM fields only need to be entered for position transfers. Print pages for completed sections and attach to the budget adjustment form.

Position 1	
Position Number (For changes to existing positions)	00001273
Existing/Proposed Job Start Date	
Existing/Proposed Job Code	697 / 208
Existing/Proposed Job Title	Accounting Specialist / Fiscal Coordinator
Position Type: Full-Time (FT), Part-Time (PT)	FT
Time Limited? Yes / No	No
If Time Limited, expected expiration date	
Location Code (four digit number)	1256
Fund	To: 110 From: 110
PS/BRASS Sub Department Id	To: 9120000400 From: 9120000400
Reports To Position Number	00001391
Reports To Job Title	Contracts & Purchasing Manager
FTE (Example: .50 / .75 / 1.0)	To: From:
Action Type: (New position (N), New TL (TL), Reclassification (R), Transfer (T), FTE Change/Re-Allocation (RA), Abolish (A), Other (O))	R

Position 2	
Position Number (For changes to existing positions)	00001393
Existing/Proposed Job Start Date	
Existing/Proposed Job Code	502 / 470
Existing/Proposed Job Title	Secretary / Office Coordinator
Position Type: Full-Time (FT), Part-Time (PT)	FT
Time Limited? Yes / No	No
If Time Limited, expected expiration date	
Location Code (four digit number)	1003
Fund	To: 110 From: 110
PS/BRASS Sub Department Id	To: 9120001200 From: 9120001200
Reports To Position Number	00000796
Reports To Job Title	Corrections Lieutenant
FTE (Example: .50 / .75 / 1.0)	To: From:
Action Type: (New position (N), New TL (TL), Reclassification (R), Transfer (T), FTE Change/Re-Allocation (RA), Abolish (A), Other (O))	R

Total No. of New FTEs:	0
Total No. of New Time Limited FTEs:	0
Total No. of Transferred FTEs:	0
Total No. of Other Actions:	0

(a) Totals will transfer to the "Adj Request" tab's FTE section.

Council Approval section below to be completed only by Council Staff and to be submitted to HR for final processing.

Council Approved:	Yes	No	Date:	Signature:
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REQUEST FOR BUDGET ADJUSTMENT

159

Executive Summary

Reference No: 363000IA01	For Fiscal Year: 2017
Requesting Organization: 36300000 PARKS	Date of Request: 8-Feb-17
Budget Adjust Type(s): FTE/Position Reclasse	One Time Change (Y or N): N
New Revenue and Expenditure	If No, next year's impact: \$0
	Net FTE Change: 1.00

Description and Justification:

Reclassification of Vacant TL Position: The Park & Recreation Bond, approved by voters in November 2016, provides approximately \$90M funding for over 100 projects. Parks & Recreation requested and was appropriated a time-limited Fiscal Coordinator position to provide fiscal support for the projects and to ensure accurate processing, monitoring, and reporting of all project financial transactions, data, and warranties. The cost was to be offset by billing the projects for the fiscal support. Parks & Recreation went through the recruitment process, and through that process determined that the job's requirements were not suited to the Fiscal Coordinator position. Parks & Recreation now requests that the position be reclassified to an Accountant position. The increase in salaries expense will be exactly and completely offset by an increase in revenue from the Bond projects, resulting in a request for no additional General Fund dollars.

Fund Impact

SUMMARY OF FUND IMPACT BY FUND

FUND:	110 GENERAL FUND
Fund Impact (Budgetary)	\$0
Fund Impact (Transfers)	\$0
TOTAL FUND IMPACT	\$0

SUMMARY OF CNTY FUNDING IMPACT BY DEPT

DEPT	REVENUE	EXPENSE	BAL SHEET	CNTY FUNDING
3630002900 DIVISION ADMINISTRATION	11,986	11,986	0	0
TOTALS	11,986	11,986	0	0

Approvals

Division Director:

[Signature]

Date:

2/8/17

Dept. or Elected Fiscal Mgr:

[Signature]

Date:

2-8-17

Dept. Dir. or Elected Official:

[Signature]

Date:

2-8-17

Facilities Division Director:

(Capital Projects Only)

[Signature]

Date:

Chief Financial Officer:

[Signature]

Date:

2-8-17

Mayor or Designee:

[Signature]

Date:

2-8-17

Council Action:

[Signature]
Approve

Date:

Approve

Budget Adjustment Detail

Budget Year: 2017 * Requesting Department: 36300000 PARKS
 Budget Period: Pre-June Interim * Req Item No: 363000IA01 * Adjustment Title: Reclassification of Vacant TL Position
 Adjustment Type(s): FTE/Position Reclass New Revenue and Expenditure

Expense Budget String(s): *This adjustment involves a reclass; while the next year's financial impact may be presented, no actual budget adjustment is required.*

FUND	AGENCY	SUB-DEPT ID	EXPENSE ACCOUNT	PROG/ACT ID (OPT)	PROJECT ID (CAP)	AMOUNT
110	030	3630002900	601040	PK120		9,594
110	030	3630002900	603005	PK120		742
110	030	3630002900	603025	PK120		1,383
110	030	3630002900	603040	PK120		50
110	030	3630002900	603045	PK120		217
TOTAL EXPENDITURE CHANGE:						<u>\$11,986</u>

Revenue Budget String(s):

FUND	AGENCY	SUB-DEPT ID	REVENUE ACCOUNT	PROG/ACT ID (OPT)	PROJECT ID (CAP)	AMOUNT
110	030	3630002900	431160	PK120		11,986
TOTAL REVENUE CHANGE:						<u>\$11,986</u>

Balance Sheet String(s): ☐ Bal sheet strings only required for Proprietary Fund adjustments; check if applicable.

FUND	SUB-DEPT ID	BAL. SHEET ACCOUNT	AMOUNT
		BAL_SHT	
		BAL_SHT	
		BAL_SHT	
TOTAL BALANCE SHEET CHANGE:			<u>\$0</u>

* One Time Change (Y or N): N No. of New FTEs: 0.00 (2)
 If No, next year's impact: \$0 No. of New Time Limited FTEs: 0.00 (2)
 No. of Transferred FTEs: 0.00 (2)
 No. of Other FTEs: 1.00 (2)

Fund Balance Transfers:

From Fund	From Dept ID	To Fund	To Dept ID	Amount

Description and justification: (Attach additional pages as needed.)*

The Park & Recreation Bond, approved by voters in November 2016, provides approximately \$90M funding for over 100 projects. Parks & Recreation requested and was appropriated a time-limited Fiscal Coordinator position to provide fiscal support for the projects and to ensure accurate processing, monitoring, and reporting of all project financial transactions, data, and warranties. The cost was to be offset by billing the projects for the fiscal support. Parks & Recreation went through the recruitment process, and through that process determined that the job's requirements were not suited to the Fiscal Coordinator position. Parks & Recreation now requests that the position be reclassified to an Accountant position. The increase in salaries expense will be exactly and completely offset by an increase in revenue from the Bond projects, resulting in a request for no additional General Fund dollars.

(1) If the request is for a grant, include the dates the grant will expire and what obligations are required of the County after the grant expires.

Position Management Information

INSTRUCTIONS: Complete one section for each position. To facilitate efficient execution of HR actions, please complete ALL fields as requested. TO fields are required for all position actions while FROM fields only need to be entered for position transfers. Print pages for completed sections and attach to the budget adjustment form.

Position 1	
Position Number (For changes to existing positions)	9351
Existing/Proposed Job Start Date	01/01/2017
Existing/Proposed Job Code	9993 to 579
Existing/Proposed Job Title	TL Fiscal Coordinator to TL Accountant
Position Type: Full-Time (FT), Part-Time (PT)	FT
Time Limited? Yes / No	Yes
If Time Limited, expected expiration date	12/31/2021
Location Code (four digit number)	1211
Fund	To: 110 From: 110
PS/BRASS Sub Department Id	To: 3630002900 From: 3630002900
Reports To Position Number	8638
Reports To Job Title	Admin & Fiscal Mgr II
FTE (Example: .50 / .75 / 1.0)	To: 1 From:
Action Type: (New position (N), New TL (TL), Reclassification (R), Transfer (T), FTE Change/Re-Allocation (RA), Abolish (A), Other (O))	R

Position 2	
Position Number (For changes to existing positions)	
Existing/Proposed Job Start Date	
Existing/Proposed Job Code	
Existing/Proposed Job Title	
Position Type: Full-Time (FT), Part-Time (PT)	
Time Limited? Yes / No	
If Time Limited, expected expiration date	
Location Code (four digit number)	
Fund	To: From:
PS/BRASS Sub Department Id	To: From:
Reports To Position Number	
Reports To Job Title	
FTE (Example: .50 / .75 / 1.0)	To: From:
Action Type: (New position (N), New TL (TL), Reclassification (R), Transfer (T), FTE Change/Re-Allocation (RA), Abolish (A), Other (O))	

Position 3	
Position Number (For changes to existing positions)	
Existing/Proposed Job Start Date	
Existing/Proposed Job Code	
Existing/Proposed Job Title	
Position Type: Full-Time (FT), Part-Time (PT)	
Time Limited? Yes / No	
If Time Limited, expected expiration date	
Location Code (four digit number)	
Fund	To: From:
PS/BRASS Sub Department Id	To: From:
Reports To Position Number	
Reports To Job Title	
FTE (Example: .50 / .75 / 1.0)	To: From:
Action Type: (New position (N), New TL (TL), Reclassification (R), Transfer (T), FTE Change/Re-Allocation (RA), Abolish (A), Other (O))	

Total No. of New FTEs:	0
Total No. of New Time Limited FTEs:	0
Total No. of Transferred FTEs:	0
Total No. of Other Actions:	1

(a) Totals will transfer to the "Adj Request" tab's FTE section.

Council Approval section below to be completed only by Council Staff and to be submitted to HR for final processing.				
Council Approved	Yes	No	Date	Signature

	Existing: Vacant Fiscal Coordinator TL	Requested: Vacant Accountant TL	Difference
Salary	REG 13 (née 24)	REG 15 (1st quartile)	
Taxes	\$ 45,756	\$ 55,350	\$ 9,594
Retirement	7.65%	7.65%	
LTD	NC Tier II Hybrid	NC Tier II Hybrid	
Supplemental Retirement	LTD	LTD	
Health Insurance	NC Tier II Hybrid	NC Tier II Hybrid	
	EMI/HDP Emp Only, ADD, LIFE	EMI/HDP Emp Only, ADD, LIFE	
	\$ 5,517	\$ 5,517	\$ 217
	\$ 62,619	\$ 74,605	\$ 11,986
			Change in Salaries Expense
			\$ 11,986
			Change in Revenue
			\$ -
			Net Budget Impact



Salt Lake County Job Description

Accountant

DEPARTMENT: Organization-wide

DIVISION: 0000

JOB CODE: 579 **GRADE:** 15

FLSA STATUS: Non-Exempt

SAFETY SENSITIVE: No

EFFECTIVE DATE: 10/30/2015

JOB SUMMARY

Provides assistance in budget preparation, control and oversight, personnel and payroll functions, procurement, asset control, and support functions. Gathers, researches, and analyzes information to coordinate and support special projects.

MINIMUM QUALIFICATIONS

Bachelor's degree from an accredited college or university in Accounting, plus one (1) year of experience in a field closely related to these duties, or an equivalent combination of related education and experience.

Regional Development

Due to the nature of this position, the successful applicant must pass a required pre-employment background check and subsequent mandatory background checks in accordance with current County Human Resources policy requirements.

ESSENTIAL FUNCTIONS

The following duties and responsibilities are intended to be representative of the work performed by the incumbent(s) in this position and are not all-inclusive. The omission of specific duties and responsibilities will not preclude it from the position.

Applicants must be prepared to demonstrate the ability to perform the essential functions of the job with or without a reasonable accommodation.

- Assists in the preparation of the annual budget. Researches and analyzes various budget issues. Assists the Administrator in monitoring the budget.
- Compares expenditures with budget appropriations to determine variances and recommends budget adjustments using county accounting software.
- Develops and monitors cash collections, petty cash disbursements, and other accounting transactions to ensure that adequate controls are in place to protect the fiscal integrity of the division.
- Provides an on-going review of internal controls with cash handling and accounting functions to ensure that assets have adequate safeguards.
- Assists in writing and revising accounts receivable and accounts payable policies and procedures.
- Collects financial data and other information for the purpose of submitting journal entries for credit for services performed.
- Develops special financial and statistical reports and records using knowledge of accounting policies, practices, and procedures.

- May conduct or assist in audits to analyze data and assess efficiency, cost effectiveness, and productivity of systems.
- Prepares grant and contract billings. Audits grant and contractual expenses.
- Maintains revenue records.
- Develops financial reports and provides program information.
- May assist in the preparation of semi-monthly payroll.

KNOWLEDGE, SKILLS AND ABILITIES (KSA)

Knowledge of:

- General accounting and auditing principles and procedures
- Effective office methods and procedures
- Cost accounting principles
- OMB Circular requirements
- General computer operations, spreadsheets, and word-processing
- Financial software programs
- Internal control principles
- Data base Knowledge
- Records management
- Cash register operations and communications
- Purchasing systems

Skills and Abilities to:

- Use of 10 Key calculators by touch
- Use a computer
- Use specialized software
- Follow written and oral instructions
- Act Independently with little direct supervision or guidance
- Read and interpret written policies, procedures, contracts, and regulations
- Communicate effectively verbally and in writing
- Resolve problems under stressful conditions
- Keep detailed financial records
- Meet challenging deadlines

WORKING CONDITIONS AND PHYSICAL REQUIREMENTS

Work is performed in a general office setting.

IMPORTANT INFORMATION REGARDING THIS POSITION

Revised Date/Consultant's Initials: 10/01/2016 TF

CONDENSED POSITION DESCRIPTION QUESTIONNAIRE (CPDQ)

CLASSIFICATION REQUEST

Please complete this form, review with department/division personnel, obtain any necessary approvals as outlined in the Council and HR Requirements Matrix, and forward to your HR consultant. In addition, please include your division's most recent Organization Chart.

This request is for a: Vacant to Existing Position

Department Name: Community Services

Position Number: 00009351

Division Name: Parks & Recreation

Division Number: 3630

Information Regarding Vacant Existing Allocation

Current Job Title/Grade: Fiscal Coordinator (Time-Limited) / 13

Job Code: 9993

New Existing Title/Grade: Accountant (Time-Limited) / 15

Agency Budget Impact:

- ☒ 1) There **is no** budget increase to this year or subsequent year's budgets resulting from this position classification change. Please provide an explanation below:

This position will support the Park & Recreation Bond projects, so the costs associated with the position will be billed to the projects. The increase in salaries expense will be offset by an increase in interfund revenue from this billing, resulting in a net neutral budget adjustment.

- ☐ 2) There **is** an increase to this year or subsequent year's budgets. Below is a summary of the budget impact:

- ☐ 3) The budget impact for this classification change is unknown at this time.

Business Justification: Please provide a brief summary of the organization need or business justification for this position classification request.

After posting the recruitment and interviewing candidates for the position, we have determined the position should be reclassified from a Fiscal Coordinator position to a higher Accountant position in order to attract and maintain a successful candidate who has project and governmental accounting experience; project and governmental procurement experience; and the ability to read, interpret, and explain legal documents.

Department/Division Approval Signatures

By providing approval and electronically signing below, this certifies that processing this classification action does not have a negative impact on the current year's personnel budget. Any budgetary impact has already been addressed and approved by the Council, as needed.

Elected Official or Department Director	Approved: <input type="checkbox"/> Yes <input type="checkbox"/> No	Signature: <input type="text"/>
Division Director/ Administrator	Approved: <input type="checkbox"/> Yes <input type="checkbox"/> No	Signature: <input type="text"/>
Immediate Supervisor	Approved: <input type="checkbox"/> Yes <input type="checkbox"/> No	Signature: <input type="text"/>
Immediate Supervisor's Title: <input type="text"/>		
E-Mail: <input type="text"/>		Phone Number: <input type="text"/>

HR Consultant Contact Information

Consultant	E-Mail	Phone
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