

Ordinance No. 119373

Council Bill No. 112561

The City of Seattle
Council Bill/Ordinance

4Q98 RECLASS ORDINANCE

Folder 1 of 2

AN ORDINANCE establishing titles, reallocating, reclassifying, redesignating, retitling, and setting compensation for certain positions in various City departments; creating new salary rates; correcting APEX market group rates on Ordinance #119212; correcting a position number as shown on Ordinance #119167; amending S.M.C. 4.13.010 by a 2/3 vote of the Council to exempt an additional position from the classified service; and providing payment therefor.

Handwritten: 2/3 vote passed 2-0 *Mark*

CF No. _____

2-8-99 Full

Date Introduced:	<u>FEB 1 - 1999</u>	
Date 1st Referred:	To: (committee)	<u>Finance & Budget Committee</u>
Date 2nd Referred:	To: (committee)	
Date 3rd Referred:	To: (committee)	
Date of Final Passage:	<u>2-8-99</u>	
Date Presented to Mayor:	<u>2-8-99</u>	
Date Returned to City Clerk:	Date Published:	Y.O. <input checked="" type="checkbox"/> F.T. <input checked="" type="checkbox"/>
Date Vetoed by Mayor:	Date Veto Published:	
Date Passed Over Veto:	Veto Sustained:	

This file is complete and ready

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Law Dept. Review

The City of Seattle - Legislative Department

Council Bill/Ordinance sponsored by: CHOE
Councilmember

Committee Action:

passed 3-0 Mackin Cho

2-8-99 Full Council: Passed 9-0

This file is complete and ready for presentation to Full Council. Committee: _____
(initial/date)

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Law Department

Law Dept. Review OMP Review City Clerk Review Electronic Copy Loaded Indexed

ORDINANCE 119373

AN ORDINANCE establishing titles, reallocating, reclassifying, redesignating, retitling, and setting compensation for certain positions in various City departments; creating new salary rates; correcting APEX market group rates on Ordinance #119212; correcting a position number as shown on Ordinance # 119167; amending S.M.C. 4.13.010 by a 2/3 vote of the Council to exempt an additional position from the classified service; and providing payment therefor.

BE IT ORDAINED BY THE CITY OF SEATTLE AS FOLLOWS:

SECTION 1. REALLOCATING, RECLASSIFYING, REDESIGNATING AND RETITLING OF POSITIONS. As recommended by the Personnel Director in Classification Determinations specified and attached hereto, positions in certain City employing units are hereby reallocated, reclassified, redesignated and retitled, or otherwise adjusted, effective as noted in respective Classification Determinations as shown below:

CITY LIGHT

1 position (#025140) of Systems Analyst reclassified to Systems Analyst, Senior (Report #98-1737).

1 position (#020803) of Systems Analyst, Senior reclassified to Systems Analyst, Principal (Report #98-1738).

1 position (#012619) of Administrative Support Assistant-BU reallocated to Electrical Engineer, Senior (Report #98-1808).

1 position (#019239) of Public Relations Specialist reclassified to Public Relations Specialist, Senior (Report #98-1866).



1 1 position (#022226) of Credit & Collections Supervisor, Assistant reclassified to
2 Credit & Collections Supervisor (Report #98-1924).

3 1 position (#017367) of Administrative Support Assistant reclassified to
4 Administrative Specialist II-BU (Report #98-1981).

5 1 position (#012390) of Accounting Support Assistant-BU, 2 positions (#019391,
6 #013941) of Administrative Specialist I-BU and 1 position (#012394) of Accounting
7 Technician I-BU reclassified to Administrative Specialist II-BU (Report #98-1982).

8 1 position (#012468) of Administrative Support Assistant-BU reallocated to
9 Engineering Aide (Report #98-2045).

10 1 position (#012536) of Accounting Technician I-BU reallocated Administrative
11 Specialist II-BU (Report #98-2202A).

12 1 position (#014237) of Warehouseman-BU reclassified to Warehouseman, Senior-BU
13 (Report #98-2249).

14 1 position (#012169) of Personnel Specialist, Supervising reclassified to
15 Manager 1, General Government (Report #98-2250).

16 1 position (#012529) of Accounting Technician I-BU reclassified to Accounting
17 Technician II-BU (Report #98-2408).

18 1 position (#019075) of Management Systems Analyst reclassified to Systems
19 Analyst, Senior (Report #98-2412).

20 1 position (#019127) of Energy Conservation Representative, Supervising
21 reallocated to Energy Management Analyst, Assistant (Report #98-2445).

22 1 position (#017593) of Finance Analyst reclassified to Energy Planning Analyst
23 (Report #98-2446).

1 position (#019296) of Research & Evaluation Assistant-BU reclassified to Administrative Staff Assistant (Report #98-2448).

1 position (#022796) of Systems Analyst, Principal reallocated to Manager 2, Information Technology (Report #98-2534).

1 position (#018485) of Energy Management Analyst Supervisor, Senior reclassified to Energy Management Analyst Supervisor (Report #98-2581).

1 position (#012851) of Civil Engineer, Assistant II reallocated to Civil Engineer, Associate (Report #98-2582).

CONSTRUCTION AND LAND USE

1 position (#017191) of Finance Analyst, Senior reallocated to Management Systems Analyst, Senior (Report #98-1626A).

1 position (#014455) of Accounting Technician II reallocated to Personnel Specialist, Assistant (Report #98-2418).

1 position (#017586) of Land Use Planning & Development Analyst reclassified to Land Use Planning & Development Analyst, Senior (Report #98-2434).

1 position (#011587) of Strategic Advisor 2, Engineering & Plans Review redesignated to Manager 3, Exempt (Report #98-2437).

1 position (#019038) of Manager III reallocated to Manager 3, Engineering & Plans Review (Report #98-2503).

EXECUTIVE – STRATEGIC PLANNING OFFICE

1 position (#026519) of TBD redesignated to Strategic Advisor 1, Exempt (Report #98-2427).



1 position (#022961) of Strategic Advisor 3, Exempt redesignated to Executive 1
(Report #98-2439).

6 positions (#008602, #010427, #015070, #020676, #022357, #025835) of
Policy & Management Analyst redesignated to Strategic Advisor 1, Exempt (Report
#98-2526).

10 positions (#010609, #011564, #015987, #017163, #020057, #020497,
#022356, #023489, #023533, #025836) of Policy & Management Analyst redesignated
to Strategic Advisor 1, Exempt (Report #98-2527).

5 positions (#010608, #021929, #022354, #022974, #025794) of Policy &
Management Analyst redesignated to Strategic Advisor 3, Exempt (Report #98-2528).

1 position (#025764) of Policy & Management Analyst redesignated to Strategic
Advisor 1, Exempt (Report #98-2529).

1 position (#007921) of Policy & Management Analyst reallocated to Systems
Analyst, Senior (Report #98-2530).

1 position (#025123) of Grants & Contracts Specialist, Senior reclassified to
Strategic Advisor 1, Human Services (Report #98-2531).

1 position (#023647) of Planning & Development Specialist, Senior reclassified
to Strategic Advisor 1, Human Services (Report #98-2532).

1 position (#023648) of Planning & Development Specialist, Senior reclassified
to Strategic Advisor 2, Human Services (Report #98-2533).

1 position (#023553) of Policy & Management Analyst redesignated to Strategic
Advisor 3, Exempt (Report #98-2536).



1 position (#015910) of Policy & Management Analyst redesignated to Strategic Advisor 3, Exempt (Report #98-2537).

1 position (#021857) of Policy & Management Analyst redesignated to Strategic Advisor 3, Exempt (Report #98-2538).

EXECUTIVE SERVICES

1 position (#019610) of Administrative Specialist II-BU reclassified to Accounting Technician III-BU [1/2/97] reclassified to Finance Analyst, Assistant [7/8/97] reclassified to Finance Analyst [6/1/98] (Report #98-1675A).

1 position (#010731) of Accounting Technician II reclassified to Accounting Technician III (Report #98-1684A).

1 position (#008852) of Video Specialist, Senior reclassified to Video Specialist II, 1 position (#017250) of Video Specialist, Senior reallocated to Video Production Specialist, Principal [10/13/93] retitled to Video Specialist II [1/1/97], 1 position (#017349) of Video Specialist, Senior reclassified to Video Production Specialist, Principal [1/1/93 – 10/12/93] reallocated to Video Specialist, Senior [10/13/93] reclassified to Video Specialist II [3/25/98], 2 positions (#024205, #025457) of Video Production Specialist, Principal retitled to Video Specialist II (Report #98-1723).

1 position (#015082) of Administrative Specialist I reclassified to Administrative Specialist II (Report #98-1869A).

1 position (#017584) of Accounting Technician Supervisor reclassified to Accountant (Report #98-2252).

1 position (#010735) of Administrative Specialist II reclassified to Accounting Technician II (Report #98-2253).



1 1 position (#016597) of Administrative Support Assistant-BU reclassified to
2 Administrative Specialist I-BU (Report #98-2327A).

3 1 position (#010670) of Accountant, Principal reclassified to Accounting
4 Technician Supervisor-BU (Report #98-2415).

5 1 position (#015879) of Accounting Technician III reclassified to Accountant
6 (Report #98-2465).

7 1 position (#010911) of Administrative Staff Assistant reclassified to
8 Administrative Staff Analyst (Report #98-2472).

9 1 position (#020817) of Parking Meter Collector, Senior reclassified to Parking
10 Meter Collector, Supervising (Report #98-2478).

11 1 position (#010579) of Policy & Management Analyst redesignated to Strategic
12 Advisor 1, Exempt (Report #98-2510).

13 1 position (#022355) of Policy & Management Analyst redesignated to Strategic
14 Advisor 1, Exempt (Report #98-2511).

15 1 position (#017165) of Policy & Management Analyst redesignated to Strategic
16 Advisor 2, Exempt (Report #98-2513).

17 1 position (#016899) of Policy & Management Analyst redesignated to Strategic
18 Advisor 2, Exempt (Report #98-2514).

19 1 position (#017167) of Policy & Management Analyst redesignated to Strategic
20 Advisor 2, Exempt (Report #98-2515).

21 1 position (#015091) of Policy & Management Analyst redesignated to Strategic
22 Advisor 3, Exempt (Report #98-2516).



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1 position (#015077) of Policy & Management Analyst redesignated to Strategic Advisor 2, Exempt (Report #98-2517).

1 position (#020825) of Policy & Management Analyst redesignated to Strategic Advisor 2, Exempt (Report #98-2518).

1 position (#022054) of Policy & Management Analyst redesignated to Strategic Advisor 2, Exempt (Report #98-2519).

1 position (#020328) of Policy & Management Analyst redesignated to Strategic Advisor 2, Exempt (Report #98-2520).

1 position (#015629) of Policy & Management Analyst redesignated to Strategic Advisor 2, Exempt (Report #98-2521).

1 position (#020498) of Policy & Management Analyst redesignated to Strategic Advisor 2, Exempt (Report #98-2522).

1 position (#018167) of Policy & Management Analyst redesignated to Strategic Advisor 2, Exempt (Report #98-2523).

1 position (#021399) of Policy & Management Analyst redesignated to Strategic Advisor 3, Exempt (Report #98-2524).

1 position (#010441) of Policy & Management Analyst redesignated to Strategic Advisor 3, Exempt (Report #98-2525).

1 position (#010424) of Policy & Management Analyst redesignated to Strategic Advisor 3, Exempt (Report #98-2539).

1 position (#015087) of Policy & Management Analyst redesignated to Strategic Advisor 3, Exempt (Report #98-2540).



1 position (#018170) of Policy & Management Analyst redesignated to Strategic Advisor 3, Exempt (Report #98-2541).

1 position (#024271) of Policy & Management Analyst redesignated to Strategic Advisor 2, Exempt (Report #98-2544).

1 position (#022970) of Policy & Management Analyst redesignated to Strategic Advisor 2, Exempt (Report #98-2552).

1 position (#011311) of Warehouser-BU reclassified to Warehouser, Senior-BU (Report #98-2565).

FIRE

1 position (#023442) of Fleet Management Coordinator reclassified to Automotive Engineer, Senior (Report #98-2081).

HOUSING & HUMAN SERVICES

1 position (#022556) of Administrative Specialist I-BU reclassified to Administrative Specialist III-BU (Report #98-2566).

1 position (#016922) of Administrative Support Assistant-BU reclassified to Administrative Specialist I-BU (Report #98-2567).

1 position (#022053) of Manager 2, Information Technology reclassified to Manager 3, Information Technology (Report #98-2638).

LEGISLATIVE

1 position (#010376) of Administrative Specialist I reallocated to Administrative Specialist II (Report #98-2499).



MUNICIPAL COURT

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1 position (#011448) of Administrative Staff Assistant reallocated to Administrative Support Supervisor-MC (Report #98-1938).

1 position (#020801) of Administrative Specialist I reallocated to Administrative Support Supervisor-MC (Report #98-1943).

1 position (#025734) of TBD reclassified to Administrative Specialist II-MC (Report #98-1956).

1 position (#016029) of Administrative Specialist I-MC reclassified to Accounting Technician II-MC (Report #98-1958).

1 position (#015098) of Court Cashier reallocated to Accounting Technician II-MC (Report #98-1964).

1 position (#011441) of Administrative Support Supervisor-MC and 1 position (#011446) of Court Clerk, Senior reallocated to Court Clerk Supervisor (Report #98-1991).

1 position (#023166) of Administrative Support Assistant-MC reallocated to Administrative Specialist I-MC (Report #98-2273A).

4 positions (#025841, #025842, #025843, #025844) of TBD reallocated to Administrative Specialist II-MC (Report #98-2422).

2 positions (#011445, #019782) of Data Technician Supervisor reclassified to Management Systems Analyst (Report #98-2480).

PARKS AND RECREATION

2 positions (#020942, #023655) of Personnel Specialist reallocated to Personnel Specialist, Senior (Report #98-2100).



1 2 positions (#020411, #023721) of Personnel Specialist, Assistant and 1 position
2 (#025372) of Administrative Specialist I-BU reclassified to Personnel Specialist (Report
3 #98-2101).

4 1 position (#017171) of Personnel Specialist reclassified to Personnel Specialist,
5 Supervising (Report #98-2102).

6 **POLICE**

7 1 position (#026351) of Management Systems Analyst reclassified to Planning &
8 Development Specialist II (Report #98-1856).

9 1 position (#006491) Data Technician Supervisor reallocated to Payroll
10 Supervisor (Report #98-1904).

11 **SEATTLE CENTER**

12 1 position (#020670) of Systems Analyst, Senior reclassified to Systems Analyst,
13 Principal (Report #98-2086).

14 1 position (#022095) of Computer Assistance Technician reallocated to Systems
15 Analyst (Report #98-2087A).

16 1 position (#023832) of Systems Programmer Analyst reclassified to Systems
17 Analyst, Senior (Report #98-2088A).

18 1 position (#020890) of Events Booking Representative reclassified to Events
19 Booking Representative, Senior (Report #98-2351).

20 **SEATTLE PUBLIC UTILITIES**

21 1 position (#008593) of Video Production Specialist reclassified to Administrative
22 Specialist II-BU (Report #96-835).



1 1 position (#024075) of Data Processing Systems Analyst retitled to Systems
2 Analyst (Report #98-1888).

3 1 position (#019590) of Customer Service Representative Supervisor reallocated
4 to Accountant (Report #98-2271).

5 1 position (#016785) of Civil Engineer, Assistant III reallocated to Civil Engineer,
6 Associate (Report #98-2303).

7 1 position (#008863) of Surveyor, Chief reclassified to Manager 2, Engineering &
8 Plans Review (Report #98-2304).

9 1 position (#008707) of Civil Engineering Specialist, Assistant III reclassified to
10 Civil Engineering Specialist, Senior (Report #98-2305).

11 4 positions (#007658, #007659, #014084, #014182) of Surveyor, Assistant
12 reclassified to Civil Engineering Specialist, Assistant I (Report #98-2306).

13 1 position (#007672) of Survey Party Chief, Assistant, 1 position (#012375) of
14 Civil Engineering Specialist, Assistant, 2 positions (#012141, #012373) of Civil
15 Engineering Specialist, Assistant II, and 1 position (#017541) of Civil Engineering
16 Specialist, Assistant III reclassified to Civil Engineering Specialist, Associate (Report
17 #98-2307).

18 1 position (#021612) of Civil Engineering Specialist, Associate, and 2 positions
19 (#007676, #007678) of Survey Party Chief reclassified to Civil Engineering Specialist,
20 Senior (Report #98-2308).

21 1 position (#007670) of Survey Party Chief, Senior reclassified to Civil
22 Engineering Specialist, Senior (Report #98-2309).



1 position (#008642) of Administrative Specialist I-BU reallocated to
Administrative Specialist II-BU (Report #98-2312).

1 position (#023883) of Planning & Development Specialist, Senior reallocated to
Strategic Advisor 3, General Government (Report #98-2313A).

1 position (#022409) of Civil Engineer Supervisor reallocated to Manager X
[1/1/98] reallocated to Manager 3, Engineering & Plans Review [1/7/98] (Report #98-
2314).

1 position (#026342) of Manager 2, Utilities reclassified to Manager 3, Utilities
(Report #98-2409).

2 positions (#008344, #008358) of Utility Laborer reallocated to Maintenance
Laborer (Report #98-2486).

1 position (#018928) of Public Education Program Specialist, 1 position
(#021936) of Civil Engineer, Senior, 1 position (#022172) of Public Relations Specialist
and 1 position (#023487) of Public Relations Supervisor reallocated to Strategic Advisor
1, General Government (Report #98-2553).

TRANSPORTATION

1 position (#008809) of Civil Engineering Specialist, Assistant II reallocated to
Finance Analyst (Report #98-2452).

SECTION 2. NEW TITLES AND/OR SALARY RATES. As recommended by the
Personnel Director, the following salary rates are established, effective as of the date
shown in respective reports, letters, or memoranda of understanding/agreement.



	<u>Departments</u>	<u>New Titles</u>	<u>New Salary Rates</u>
1	Executive Services	Video Specialist II	Range 33.0A Effective January 1, 1997 (Salary Report #98-2046)
2			
3	Executive Services	Parking Meter Collector, Supervising	Range 24.0A Effective July, 1, 1997 (Salary Report #98-2641)
4			
5	Design, Construction and Land Use	Permit Process Leader	Range 38.5A Effective October 29, 1998 (Salary Report #98-2554)
6			
7	<u>Departments</u> Varies	<u>Titles</u> Payroll Supervisor	<u>New Salary Rates</u> Range 34.0B Effective January 1, 1997 (Report #98-2353)
8			
9	Varies	Machinist Specialist	\$17.08 - 17.83 - 18.57 Effective July 8, 1998 (MOA dated December 16, 1998)
10			
11	Varies	Hydroelectric Maintenance Machinist	\$23.63 - 24.41 - 25.20 - 26.25 Effective July 8, 1998 (MOA dated December 16, 1998)
12			
13	Varies	Hydroelectric Maintenance Machinist Apprentice	\$17.85 - 18.90 - 19.95 - 21.00 - 22.05 - 23.10 - 24.15 - 25.20 Effective July 8, 1998 (MOA dated December 16, 1998)
14			
15	Varies	Hydroelectric Maintenance Machinist Crew Chief	\$25.63 - 26.46 - 27.56 Effective July 8, 1998 (MOA dated December 16, 1998)
16			
17	Seattle Transportation	Asphalt Paving Supervisor	7/17/96: \$21.55 - 22.35 - 23.23 - 24.14 1/8/97: \$22.11 - 22.93 - 23.83 - 24.77 1/7/98: \$22.88 - 23.73 - 24.66 - 25.64 1/6/99: \$23.45 - 24.32 - 25.28 - 26.28 Effective July 17, 1996 (MOA dated November 19, 1998)
18			
19			
20	Office of Hearing Examiner	Deputy Hearing Examiner	Grade 445: \$32.05 - 33.30 - 34.58 - 35.86 - 37.25 Effective July 1, 1998 (Salary Report #98-1992)
21			
22			
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1 Hereafter, the rates of compensation for the first steps of the titles listed below,
2 having the minimum wage as the starting step shall be the rates provided by the
3 Federal Minimum Wage or the State Minimum Wage, whichever is higher. Successive
4 salary steps shall be increased concurrently to maintain the same salary differential as
5 established by this ordinance for these four titles.

<u>Departments</u>	<u>Titles</u>	<u>New Salary Rates</u>
6 Varies	Work Training Enrollee- Intermittent	\$5.70 - 6.75 - 8.00 Effective January 1, 1999 (Salary Report #98-2643)
8 Varies	Work Training Enrollee, Tier II-Intermittent	\$9.60 - 10.50 - 12.50 Effective January 1, 1999 (Salary Report #98-2643)
10 Varies	Youth Employment Enrollee-Sum-NC *	\$5.70 Effective January 1, 1999 (Salary Report #98-2643)
12 Varies	Youth Employment Enrollee-Sum *	\$5.70 Effective January 1, 1999 (Salary Report #98-2643)

14
15 **SECTION 3. NEW SALARY RATES.** As recommended by the Personnel
16 Director, the following salary rates are established, effective January 6, 1999, shown in
17 Salary Report #98-2501, Municipal Judicial Officers. The following titles will not be
18 eligible to receive future Cost-of-Living Adjustments (COLAs). No COLAs past 1999 will
19 be granted.

<u>Department</u>	<u>Titles</u>	<u>New Salary Rates</u>
20 Municipal Court	Municipal Judge	\$46.01/hour
21 Municipal Court	Municipal Judge-Pro Tempore-Day	\$46.01/hour



1	Municipal Court	Municipal Judge-Pro Tempore-Night	\$46.01/hour
2	Municipal Court	Magistrate	\$35.07 -36.47 - 37.92 - 39.43 - 41.00/hour
3	Municipal Court	Magistrate Supervising	\$37.34 - 38.83 - 40.38 - 41.99 - 43.66/hour
4			
5	Municipal Court	Magistrate-Pro Tempore-Day	\$35.07/hour

6 **SECTION 4. CORRECTION TO ORDINANCE #119212.** The following is
 7 submitted to correct the Accountability Pay for Executives (APEX) Market Group rates
 8 for the Executive 1 and 4 market groups. Inadvertent miscalculations were made when
 9 applying the 2.565% increase to the current year (1998) and 1999 rates for Executive 2
 10 and 3 market groups, as shown in Ordinance #119212, Section 1:

11	APEX				
12	Market	1999	Corrected	2000	Corrected
13	Group	<u>Legislated Rates</u>	<u>1999 Rates</u>	<u>Legislated Rates</u>	<u>2000 Rates</u>
14	Executive 2	\$32.52 - 43.91	\$31.75 - 42.87	\$33.35 - 45.14	\$32.56 - 43.97
15	Executive 3	\$39.97 - 52.69	\$39.02 - 52.69	\$40.99 - 54.04	\$40.02 - 54.04

16 **SECTION 5. POSITION NUMBER CORRECTION.** The following is submitted
 17 to correct a position number as shown in Ordinance #119167, Section 1:

18	<u>Department</u>	<u>Title and Position # as shown</u>	<u>Correct Position #</u>
19	Seattle	Executive 2	Executive 2
20	Public Utilities	Position #021935 (C/C Log #98-1810)	Position #024181 (C/C Log #98-1810)

21 **SECTION 6. EXEMPT POSITION.** As recommended by the Personnel Director
 22 in response to a request from a customer department to render a certain position of



1 employment exempt from the classified service, S.M.C. 4.13.010 (known as the
2 Exemptions Ordinance), Subsection G, is hereby amended as follows:

<u>Employing Unit</u>	<u>Titles of Exempt Positions</u>
G. Executive	Administrative Staff Analyst (SPO)
	Administrative Staff Assistant (OED)
	Administrative Staff Assistant (OCR)
	Administrative Staff Assistant (OIR)
	All directors of offices in the Executive Department
	All positions in the Office of the Mayor
	Intergovernmental Relations Coordinator (OIR)
	International Community Programs Coordinator (OIR)
	International Specialist, Chief (OIR)
	((Policy and Management Analyst (SPO)))
	<u>Public Relations Specialist (SPO) (PosNo. 026517)</u>

15 **SECTION 7.** The heads of respective departments affected by this ordinance
16 are hereby authorized to use unexpended and unencumbered funds accumulating in
17 their respective 1999 Budgets to pay the compensation authorized herein.

18
19 **SECTION 8.** The heads of respective departments are authorized to fill such
20 positions subject to civil service and personnel rules and laws.
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City of Seattle

Paul Scheil, Mayor

Executive Services Department

Dwight D. Dively, Director

MEMORANDUM

DATE: January 15, 1999

TO: Councilmember Martha Choe, Chair
Finance and Budget Committee
Legislative Department

FROM: Nancy Schaefer *NS*
Classification/Compensation Director

SUBJECT: Represented Positions on the Fourth Quarter 1998 Reclassification Ordinance for the Committee Agenda on February 3, 1999.

The following is a breakdown of those positions from the Fourth Quarter 1998 Reclassification Ordinance that would be represented or continue to be represented following legislation. These positions are listed by bargaining unit, position title proposed by the Ordinance, and number of affected positions.

<u>Bargaining Unit</u>	<u>Proposed Title</u>	<u># of Position(s)</u>
004- Prof. and Technical Engineers, Local 17, Technical Unit	Civil Engineering Spec, Assistant I	4
	Civil Engineering Spec, Associate	5
	Engineering Aide	1
	Land Use Planning & Dev Analyst, Sr	1
007- Teamsters, Local 117	Warehouser, Senior-BU	2
019- Public Service & Industrial employees, Local 1239	Maintenance Laborer	1
031- Prof. And Technical Engineers, Local 17, Senior Business Unit	Credit and Collections Supervisor	1
032- Prof. and Technical Engineers, Local 17, Sr Professional Unit	Civil Engineering Spec, Senior	5
	Electrical Engineer, Senior	1



Councilmember Martha Choe, Chair
 Finance and Budget Committee
 January 15, 1999
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034- Prof. and Technical Engineers, Local 17, Professional Unit	Accountant	3
	Civil Engineer, Associate	2
	Systems Analyst	2
035- Prof. and Technical Engineers, Local 17, Admin. Support Unit	Accounting Technician I-BU	2
	Accounting Technician II-BU	1
	Administrative Specialist I-BU	2
	Administrative Specialist II-BU	8
	Administrative Specialist III-BU	1
040- Teamsters, Local 763- Muni Court Svc Employees	Administrative Specialist I-MC	1
	Administrative Specialist II-MC	5
	Administrative Support Supervisor-MC	2
	Accounting Technician II-MC	2
	Court Clerk Supervisor	2

The following is a breakdown of those positions that would no longer be represented following legislation of the Fourth Quarter 1998 Reclassification Ordinance. These positions are listed by bargaining unit, proposed title, and number of positions affected.

<u>Former Bargaining Unit</u>	<u>Proposed Title</u>	<u># of Positions</u>
004- Prof. and Technical Engineers, Local 17, Technical Unit	Administrative Staff Assistant	1
	Finance Analyst	1
031- Prof. And Technical Engineers, Local 17, Senior Business Unit	Credit & Collections Supervisor	1
032- Prof. And Technical Engineers, Local 17, Senior Prof Unit	Strategic Advisor 1, General Government	1
	Manager 3, Engineering and Plans Review	1
034- Local 17, Prof. and Technical Eng., Professional Unit	Systems Analyst, Senior	2
035- Local 17, Prof. and Technical Eng., Admin. Support Unit	Finance Analyst	1

If you have any questions, please call me at 386-9081.

NS:lyl



Fiscal Note

Each piece of legislation that is financial in nature will be accompanied by a fiscal note. The fiscal note should be drafted by department staff and will identify operating, capital, revenue, and FTE impacts of the legislation.

Department: ESD, Personnel Division, Class/Comp Unit	Contact Person/Phone: Linda Yuen Leong/684-7970 Nancy Schaefer/386-9081	CBO Analyst/Phone: Barbara Gangwer/615-0768
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Legislation Title: AN ORDINANCE establishing titles, reallocating, reclassifying, redesignating, retitling, and setting compensation for certain positions in various City departments; creating new salary rates; correcting APEX market group rates on Ordinance #119212; correcting a position number as shown on Ordinance # 119167; amending S.M.C. 4.13.010 by a 2/3 vote of the Council to exempt an additional position from the classified service; and providing payment therefor.

Summary of the Legislation: *Section 1* includes positions recommended for reallocation, reclassification, redesignation and retitling. *Section 2* recommends new salary rates and/or titles for various departments. *Section 3* establishes a new salary rate for Municipal Judicial Officers and provides that no COLAs past 1999 will be granted. *Section 4* corrects the Accountability Pay for Executives (APEX) Market Group rates for the Executive 1 and 4 market groups as shown in Ordinance #119212, Section 1. *Section 5* corrects a position number as shown in Ordinance #119167, Section 1. *Section 6* amends the Exemptions Ordinance #119247, by adding a new title and eliminating an obsolete title.

Background (Included justification for the legislation and funding history, if applicable): See Attachment A, Sections 1 through 6: individual classification determination reports and memoranda.

Sustainability Issues (related to grant awards): None

Estimated Expenditure Impacts: See Attachment C and Attachment E.

One-time \$1,773,371.91, an estimated cost through 12/31/99.

On-going \$1,143,576.48, annual on-going (12 months) cost at 1998 rates.

Estimated Revenue Impacts: None.

Estimated FTE Impacts: 0

Do positions sunset in the future? If so, when? No.

Other Issues (including long-term implications of the legislation): See Attachment A, Sections 1 through 6 and the Attachment C (Fourth Quarter 1998 - Non-Project Costing by departments.)





City of Seattle

Paul Schell, Mayor

Executive Services Department

Dwight D. Dively, Director

MEMORANDUM

DATE: January 15, 1999

TO: Honorable Sue Donaldson, President
Seattle City Council

Attn: Barbara Gangwer
City Budget Office

FROM:


Dwight Dively, Director
Executive Services Department


Norma McKinney
Personal Director

SUBJECT: Proposed Legislation – Fourth Quarter 1998 Reclassification Ordinance

The attached ordinance will implement proposed position, title, classification, and salary changes recommended by the Personnel Director during the Fourth Quarter of 1998.

Section 1 includes positions recommended for reallocation, reclassification, redesignation and retitling. *Section 2* recommends new salary rates and/or titles for various departments. *Section 3* establishes a new salary rate for Municipal Judicial Officers and provides that no COLAs past 1999 will be granted. *Section 4* corrects the Accountability Pay for Executives (APEX) Market Group rates for the Executive 1 and 4 market groups as shown in Ordinance #119212, Section 1. *Section 5* corrects a position number as shown in Ordinance #119167, Section 1. *Section 6* amends the Exemptions Ordinance #119247, by adding a new title and eliminating an obsolete title.

Attachment A contains referenced classification/compensation report recommendations and other documentation as indicated in the ordinance.

Attachment B contains costing estimates for classification actions. The costing estimates in this report are for general use in estimating the approximate budgetary impact of the actions that are on the accompanying ordinance. These estimates do not necessarily reflect formal budgetary appropriations or the amount due to any given employee(s). These estimates are based on the following premises:



Honorable Sue Donaldson, President
Seattle City Council
January 11, 1999
Page 2

- The beginning date is the first day of the month of the effective date in the report, and the cost is estimated through the end of the year when Council hears the legislation for adoption.
- For regular positions, calculations are based on the difference between the top steps of the current and recommended salary ranges; for retroactive actions extending back to previous year(s), the rates for the respective previous years are used. The 1998 rates are used for 1998 and 1999.
- For Accountability Pay for Executives (APEX), Managers and Strategic Advisors titles, cost comparisons are made to the range midpoint.
- Calculations are based on the premises that the positions are full-time, and that they are filled at the budgeted level. (The payroll units of affected departments will conduct actual payroll calculations, which will consider additional information such as underfills, out-of-class, periods of vacancy, positions working more or less than their budgeted full-time-equivalency, and other information that is available at the department level.)

Our cost estimates are obtained by adding the employer's matching FICA, retirement, and Medicare benefits to the salary shown in the Salary Schedule. Currently, the employer's contribution for retirement is 8.91 percent and the employer's 1998 matching contribution rates for FICA is 6.2 percent and 1.45 percent for Medicare.

Attachment C displays the summary of classification requests acted upon and the estimated increased or decreased cost of each change from the effective date through the end of 1999, as well as departmental and Citywide total cost estimates. Consistent with past practice, Classification Project and Budget clean up actions are not included in the costing calculations.

Attachment D separately identifies special or unusual costs attributed to Information Technology impacts or other identified sources. These costs are already included in the summary of *Attachment C* and do not represent additional costs.

Attachment E contains costing estimates for salary reports, agreements and letters.

- The beginning date is the first day of the month of the effective date in the report, and the cost is estimated through the end of the year when Council hears the legislation for adoption.
- Calculations are based on the difference between the top steps of the current and recommended salary ranges multiplied by the full-time equivalents as of the effective date; for retroactive actions extending back to previous year(s), the rates



Honorable Sue Donaldson, President
Seattle City Council
January 11, 1999
Page 3

for the respective previous years are used. The 1998 rates are used for 1998 and 1999.

Our cost estimates include the statutory benefits described under Attachment B.

If you have any questions or need additional information regarding this ordinance, please contact Nancy Schaefer, Classification/Compensation Director, at 386-9081. Thank you.

DD/NM:nsi

Attachment: Fourth Quarter 1998 Reclassification Ordinance

c: Councilmember Martha Choe, Chair
Finance and Budget Committee, Legislative Department



PERSONNEL DIVISION--Legislation Procedures and Checklist (updated 9/98)

THIS CHECKLIST MUST BE ATTACHED TO THE LEGISLATION. ALL LEGISLATION MUST GO THROUGH LORNA -- PLEASE DO NOT SEND LEGISLATION DIRECTLY TO DWIGHT'S OFFICE. HIS OFFICE WILL RETURN LEGISLATION AND WILL DELAY THE PROCESS. THANKS.

FOURTH QUARTER 1998 RECLASS ORDINANCE

1/5/98 (ljl/kk) 1. **Draft Legislation.** Each Unit is responsible for drafting legislation. There will be NO RUSH legislation. Legislation must be in Dwight's office **FOUR (4) WEEKS** prior to the targeted committee meeting, **NO EXCEPTIONS.**

While in the drafting/development stage, it is advisable that you **CONSULT** with the Law Department, the City Budget Office (only if legislation is financial in nature), and the Policy Unit in Personnel.

- Unit Contact: Linda Yuen Leong/Nancy Schaefer
- CBO Contact (financial nature only): Barbara Gangwer
- Law Contact: Marilyn Sherron
- Sponsoring Council Committee: Finance and Budget
- Requested Council Date: February 3, 1999 (Scheduled with Jill Nishi)

(Do NOT call Council Committee: Lorna will schedule with Council)

DD

Policy Staff Review. If there are no changes, Policy Staff will give legislation to Lorna for Norma's signature. **For changes, the following steps will occur:**

- Lorna will give complete package back to the originating Unit for correction(s).
- ALWAYS USE THE DISK FOR CORRECTION(S).
- When done, remember to save your document to your computer for your Unit's records.
- If there are **changes on the title**, make sure the blue folder label is corrected.

1/14/99

Package Legislation

- Legislation should only be prepared from the standard templates.
- Copy legislation and attachments into a disk and place in envelope (2-hole punched and fastened)
- Attachment(s) and back-up documents (2-hole punched and fastened)
- Hard copy of legislation (2-hole punched and fastened)
- Cover letter for Personnel Director's and ESD Director's signature (paper clipped in front of folder)
- Legislation title typed on label (affixed to folder--if too long, use another label)

1/15/99

4. **Hand deliver** complete package to Lorna. She will log legislation.



✓ memo to
5. **Personnel Director signs cover letter of legislation.** Lorna will call your Unit's contact person for pick-up of signed legislation. Originating Unit staff copies legislation and distributes to: (a) Unit's file; (b) advance copies and attachment(s) to appropriate offices. There will be **NO ADVANCE** copies delivered to City Council, Law, and/or CBO. This is the reason for the **FOUR (4) WEEKS** deadline to Dwight.

1/15/09
6. **Contact Lorna when ready for delivery to Dwight's Office.** She will E-mail his Assistant notifying her that a legislation is on its way for Dwight's signature. A signed copy of the legislation cover memo will be sent Lorna. (Please do **NOT** call Dwight's Office looking or wanting a signed copy.) Lorna is responsible for forwarding the signed copy to the originating Unit for their files. Dwight's Office will forward legislation to OMP.

IF CBO OR THE LAW DEPARTMENT HAS EDITS, PLEASE FOLLOW INSTRUCTIONS BELOW:

7. Originating Unit staff and/or Policy Unit staff may receive calls from COB, Law, and/or Council staff for additional clarification and/or information. From these conversations changes/corrections may occur. **STAFF MUST NOTIFY LORNA via E-Mail** with the following information:

- Who is recommending the changes/rewrites?

- Will this cause a delay for the scheduled Council presentation?

- Who is making the correction on the disk?

- Who is delivering the corrected legislation to appropriate staff?

- Where will the legislation be delivered?



From: Linda Yuen-Leong
To: Lorna Walath
Date: Thu, Jan 7, 1999 9:48 AM
Subject: Re: 4th Quarter 1998 Reclassification Ordinance

I happened to speak with Jill regarding another issue. Thanks for the reminder - as usual I will plan to consult with you first regarding scheduling. Sorry, if this may have caused some problems.

FYI, I've consulted with Barbara Gangwer, and she doesn't seem to have any problems to meet the 1/26/99 deadline for referral to Council.

What are the issues that must be "fixed?" Nobody has spelled them out for me. I was gone to physical therapy yesterday afternoon. Thanks!

>>> Lorna Walath 01/07 9:04 AM >>>

Linda,

Just a reminder... please do not call Council staff directly. This is noted on the checklist for legislation processing. Now, I'm finding out that there are several issues that must be "fixed" regarding this particular ordinance. If your team can fix these issues by the date you scheduled with Council that's great! However, if not, it is quite embarrassing for our Division/Norma to schedule an item then take it out. If you have any questions, please call me and I can give you some directions. Thanks very much for your cooperation. For now, I will not call Jill Nishi until I hear from your team whether the issues can be fixed by the scheduled time. Thanks again for your understanding.

lorna walath
(206) 684-4637

>>> Linda Yuen-Leong 1/6/99 11:52:55 AM >>>
Lorna, Happy New Year!

I spoke with Jill Nishi yesterday regarding the 1999 F&B Committee. She went ahead and scheduled our 4q98 Reclass Ordinance on February 3, 1999. **Fast track** on this piece of legislation is greatly appreciated as it involves a lot of classifications citywide.

Thank you for your coordination. I'll bring it down to Laurie, Policy Management, shortly.

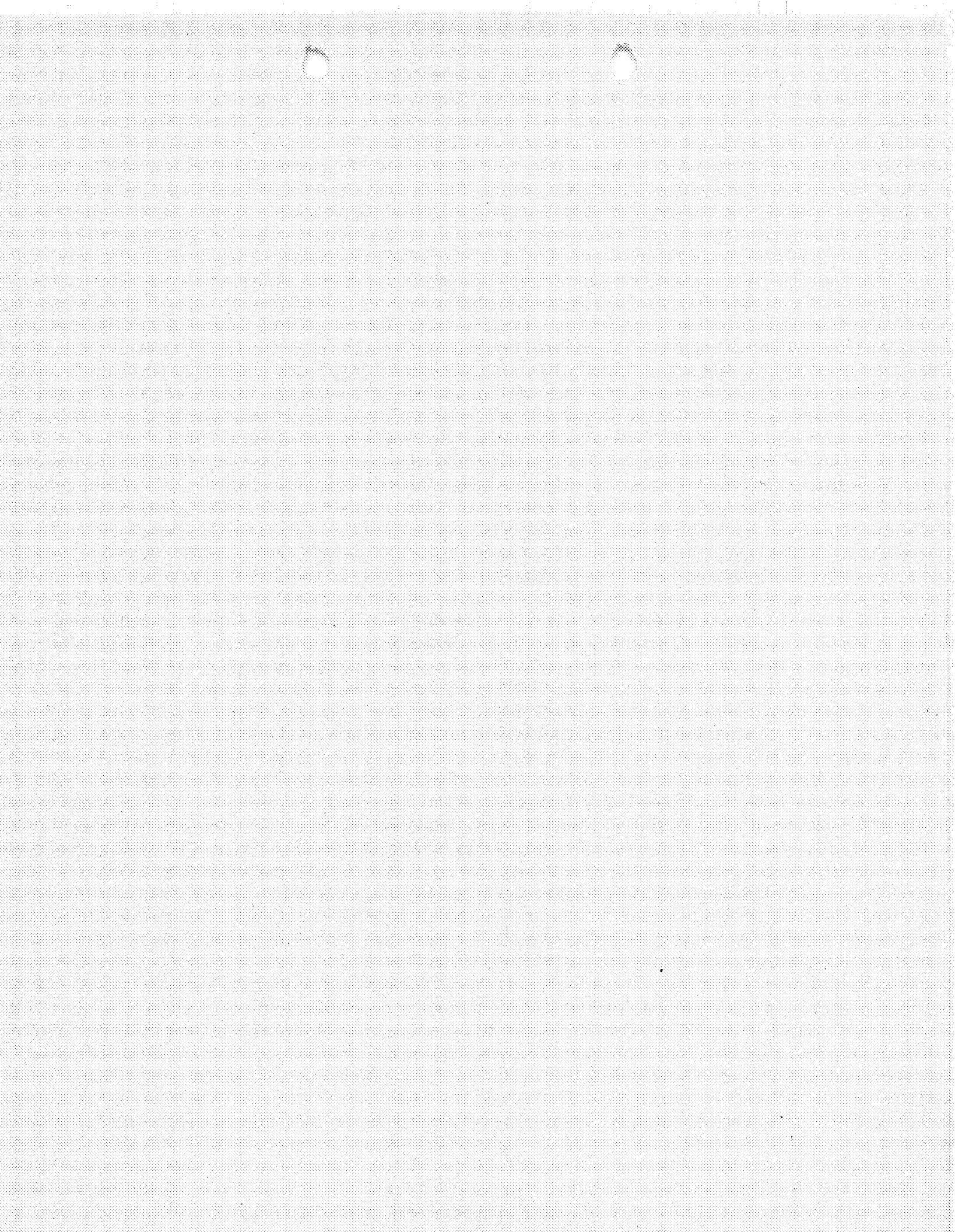
Unit Contact: Linda Yuen Leong, 4-7970
Presenter: Nancy Schaefer, 6-9081
City Budget Office: Barbara Gangwer, 615-0768
Law Department: Marilyn Sherron
Sponsoring Council Committee: Finance and Budget
Council Committee Date: February 3, 1999

CC: Edie Jorgensen, John Pearson, Nancy Schaefer



ATTACHMENT A contains referenced classification/
compensation report recommendations and other
documentation as indicated in the ordinance.

ATTACHMENT A





CLASSIFICATION DETERMINATION REPORT

Date:		Report No.: 98-1737	
<u>POSITION IDENTIFICATION</u>			
Department:	City Light		
Classification Title:	Systems Analyst		
Ordinance Title:	Systems Analyst		
Position Number:	025140		
Bargaining Unit:	034	Current Salary: \$20.19 - 23.59 (Range: N/A)	
<u>RECOMMENDED ACTION</u>			
Classification Title:	Systems Analyst, Senior		
Ordinance Title:	Systems Analyst, Senior		
Legislation Required:	Yes		
Bargaining Unit:	030	Recommended Salary: \$23.78 - 27.73 (Range: 37.5A)	
Remarks	Reclassification; Effective: October 1, 1997		
<u>INCUMBENT STATUS</u>			
Incumbent:			
Current Standing:	Systems Analyst		
Recommended Standing:	Systems Analyst, Senior		
In recommended standing, incumbent status is:			
<input checked="" type="checkbox"/> Regular		<input type="checkbox"/> Probationary	
<input type="checkbox"/> Temporary			
Authority: Personnel Rule			
<input type="checkbox"/> 2.3100		<input checked="" type="checkbox"/> 2.3.200	
<input type="checkbox"/> 2.3.300			

Recommended: Team B *[Signature]* Classification Analyst(s)

Approved: John Pearson *[Signature]* Classification Supervisor

Lidia Santiesteban *[Signature]* Classification/Compensation Director

Norma McKinney *[Signature]* Personnel Director



Position Identification And Source Of Request

Position #025140 was reviewed as a result of a request from the Information Technology Division within the City Light Department. This position is currently classified at the journey level within the Systems Analyst class. Divisional management believes that the level of work assigned has increased to the senior level.

Background

The PDQ submitted for review indicates that the subject position serves as lead for the Computer Aided Design and Drawing (CADD) project. The CADD drawings and associated databases are used to design and manage the utility's generation and transmission facilities. The CADD management systems consist of more than 60,000 drawings and two Geographical Information Systems (GIS) databases.

Scope of Review:

This review was conducted by Gail Thompson, a Classification Analyst assigned to Team 2. This review consisted of an analysis and evaluation of the following:

- ◆ the Position Description Questionnaire (PDQ) dated February 24, 1998;
- ◆ class specifications in the Systems Analyst class series;
- ◆ comparison to similar positions within the department and throughout the City;
- ◆ review of the subject position's organization unit;
- ◆ position history records and related classification files.

Summary of Work

The essentially purpose of this position is to:

- ⇒ plan, develop, deploy and maintain the CADD system,
- ⇒ develop customized tools for CADD users,
- ⇒ coordinate the integration of CADD and GIS systems,
- ⇒ diagnose software or hardware system failures, and
- ⇒ plan for the Utility's future CADD related needs.

NOTE: For a complete listing of the subject position's responsibilities, see the Position Description Questionnaire (PDQ) submitted for this review and included in the position file.

Class Concepts

For this review the journey and senior levels within the Systems Analysts class series were chosen. The work of these levels is defined as follows:

Systems Analysts provide technical support to ensure that the automated aspect of the "system" is functioning both optimally and systematically. Systems Analysts perform functions such as writing code, writing formulas, establishing network links through programmatic functions, etc. They also apply technical expertise and software-specific knowledge to maximize the overall efficiency through the development and use of automated systems.



In contrast, Senior Systems Analysts plan, develop, coordinate and analyze data processing systems to determine feasibility and practicality of requested services, and diagnose system failures to isolate source of problem between equipment, system software and application programs. Incumbents at this level also serve as project leads, and are sought out as technical experts on issues and decisions involving interpretation and analysis of established choices with limited precedents.

Analysis

The subject position was created and allocated to the title of Systems Analyst in the 1996 Budget. At the time of review, the position's responsibilities included: planning, coordinating, administering and providing technical support to City Light's GIS and integrated Computer Aided Drawing applications.

According to departmental management, the subject position is the only CADD related position in the department. The CADD system has grown into a fairly large system, supporting over 200 users in various locations throughout the Utility. And, as a result of its growth, the assigned duties and responsibilities have also grown substantially. The role of the subject position has evolved from one of support to that of lead developer, which requires a greater level of technical and project management skill.

Recommendations

We recommend, based on the scope and level of responsibility assigned, that the subject position be reclassified to the title of Senior Systems Analyst. The effective date of this action should be October 1, 1997, the date management states the work changed.

Costing

If implemented on the 1998 4th Quarter Ordinance, the maximum estimated cost of implementing this action would be \$22,670.59. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be \$10,075.82. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: September 18, 1998

Report No.: 98-1738

POSITION IDENTIFICATION

Department: City Light, Information Technology Division
Classification Title: Systems Analyst, Senior
Ordinance Title: Systems Analyst, Senior
Position Number: 020803
Bargaining Unit: 030 Current Salary: \$23.78 - 27.73 (Range:37.5A)

RECOMMENDED ACTION

Classification Title: Systems Analyst, Principal
Ordinance Title: Systems Analyst, Principal
Legislation Required: Yes
Bargaining Unit: 030 Recommended Salary: \$26.20 - 30.39 (Range: 40.0A)
Remarks Reclassification effective: February 26, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: Systems Analyst, Senior
Recommended Standing: Systems Analyst, Principal
In recommended standing, incumbent status is:
 Regular Probationary Temporary
Authority: Personnel Rule
 2.3100 2.3.200 2.3.300

Recommended: Team 2 *JCS* Classification Analyst(s)
Approved: John Pearson *J* Classification Supervisor
Lidia Santiesteban *LS* Classification/Compensation Director
Norma McKinney *NM* Personnel Director



Position Identification And Source Of Request

Position #020803 is located in the Information Technology Support Services Unit within the Information Technology Division of the City Light Department. It is being reviewed as a result of a departmental request.

Background:

Management states that this position serves as the focal point for City Light's Web Internet development, and is considered the technical expert in Internet development and administration technology. It is therefore, requesting that this position be reclassified from the senior level to the principal level within the System Analyst class series.

Scope of Review:

This review was conducted by Gail Thompson, a Classification Analyst assigned to Team 2. This review consisted of an analysis and evaluation of the following:

- ◆ the Position Description Questionnaire (PDQ) dated February 26, 1998;
- ◆ an informational interview with the position incumbent;
- ◆ class specifications in the Systems Analyst class series;
- ◆ comparison to similar positions;
- ◆ review of the subject position's organization unit;
- ◆ position history records and related classification files.

Summary of Work

According to the submitted PDQ, 90% of the subject position's time is spent performing complex and technically difficult work in response to the department wide Web Internet project and Web based services. The remaining 10%, is spent providing professional guidance and training to other professional and technical personnel.

This position is considered the Web Internet expert for the City Light Department. It is responsible for:

- » establishing a Utility business plan to enable Web access for all strategic Utility applications and business functions;
- » overseeing and monitoring all phases of the Web development project, related applications, business functions and standards, including the planning, development, design and implementation;
- » establishing Web software and hardware architecture standards in concert with City standards;
- » monitoring and making changes to optimize Web performance;
- » coordinating and acting as the department's liaison in the administration of Web related City wide Public Access Network policies and procedures;
- » providing application development and maintenance support; and
- » providing direction and supervision to the staff.

NOTE: For a complete listing of the subject position's responsibilities, see the Position Description Questionnaire (PDQ) submitted for this review and included in the position file.



Class Concepts and Comparisons

The subject position was compared to the class specifications of Systems Analyst Senior and Principal for the purpose of determining the appropriate classification. Positions classified as senior, under general supervision, plan, develop, coordinate and analyze data processing systems to determine feasibility and practicality of requested services, including diagnosing system failures to isolate the source of problems between equipment, system software and application programs. Work at this level requires considerable knowledge of system design and development practices, concepts and methods appropriate to the specialty. In contrast, positions classified as principal, under limited supervision, develop the overall project plans; identify and resolve critical problems that primarily concern major or City-wide systems. Work at this level requires extensive experience and knowledge of system design and development principles, concepts and methods appropriate to the specialty.

In comparing the aforementioned class specification with the duties of the subject position, I find that the appropriate classification is that of Systems Analyst, Principal. The duties assigned to the subject position do not correspond to the senior level, i.e., *servicing as project manager or lead over professional staff designing, developing and implementing complex systems/projects*. They are rather, highly technical in nature. The position is the technical expert for designing, developing, implementing and maintaining a new system that involves a major departure from established practices. As such, the duties are clearly within the class of Systems Analyst, Principal.

Recommendation

It is therefore, recommended that the subject position be reclassified to the title of **Systems Analyst, Principal**. This action should become effective February 26, 1998.

Costing


If implemented on the 1998 4th Quarter Ordinance, the maximum estimated cost of implementing this action would be \$12,408.18. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be \$6,473.84. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.







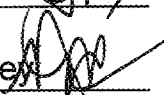
CLASSIFICATION DETERMINATION REPORT

Date: July 30, 1998		Report No.: 98-1808	
POSITION IDENTIFICATION			
Department:	City Light		
Classification Title:	Administrative Support Assistant		
Ordinance Title:	Administrative Support Assistant - BU		
Position Number:	012619		
Bargaining Unit:	035	Current Salary:	\$11.82 - 13.26 (Range:18.0B)
RECOMMENDED ACTION			
Classification Title:	Electrical Engineer, Senior		
Ordinance Title:	Electrical Engineer, Senior		
Legislation Required:	Yes		
Bargaining Unit:	032	Recommended Salary:	\$25.00 - 29.10 (Range: N/A)
Remarks	See next page for pertinent allocation information		
INCUMBENT STATUS			
Incumbent:	Vacant		
Current Standing:			
Recommended Standing:			
In recommended standing, incumbent status is:			
<input type="checkbox"/> Regular	<input type="checkbox"/> Probationary	<input type="checkbox"/> Temporary	
Authority: Personnel Rule			
<input type="checkbox"/> 2.3100	<input type="checkbox"/> 2.3.200	<input type="checkbox"/> 2.3.300	

Recommended: Team 2  Classification Analyst(s)

Approved: John Pearson  Classification Supervisor

Lidia Santiesteban  Classification/Compensation Director

Norma McKinney  Personnel Director





CITY OF SEATTLE PERSONNEL DEPARTMENT
Classification/Compensation Unit

RECEIVED

JAN 16 1998

HUMAN RESOURCES
DIVISION

**ABBREVIATED
POSITION DESCRIPTION QUESTIONNAIRE
INSTRUCTIONS**

Purpose: The Position Description Questionnaire (PDQ) is the primary source document to describe a position for a classification review. The *Abbreviated* PDQ is a shortened version of the City's regular PDQ which may be used, under the circumstances described below, by departmental management to request a classification review. The PDQABR is geared toward reclassification situations in which an incumbent employee is not affected—usually new or vacant positions. The purpose of this form is to minimize the time a department spends in completing the form, and the time for City Personnel's Classification/Compensation Unit to complete their review. This form asks for the minimum information necessary in order for City Personnel to make a reasonable and defensible classification determination on a position.

When to Use the Abbreviated PDQ: The PDQABR may be used by a department in-lieu-of the regular PDQ to request a classification review when all of the following conditions are met:

- The request is being initiated by the department's management;
- The position under review is either *currently vacant* or a *proposed new position*;
- The department is requesting a title for which a class specification already exists; or
- The department believes that the position can adequately be described using the abbreviated format.

When Not to Use the Abbreviated PDQ: Conversely, the PDQABR should *not* be used if *any* of the following conditions are met. (In these cases, the regular PDQ should be used.)

- The request is being made by an employee who is (or ever was) occupying the subject position;
- The position under review is currently filled; or
- The request is for a new title (i.e., a title for which there is currently not a written class specification).

Using the Abbreviated PDQ: The department should have a clear idea of the title that is the desired outcome of the classification review. The person completing the PDQABR should have the class specification for that title in hand. Under "Position Summary," describe the duties of the subject position; and under "Position Allocation Criteria," explain how those duties relate to specific duty statements on the class specification. The instructions on the PDQABR are intended to be brief and self-explanatory, but please feel free to call the Class/Comp Analyst assigned to your department if there are any questions.

Class/Comp's Review of the Abbreviated PDQ: If the Class/Comp Analyst agrees with the requested title, the Analyst will attach a report cover sheet and the completed PDQABR will become the text for an expedited classification report. If the Analyst has any questions on the PDQABR, or does not agree with the requested title, the Analyst will contact the department for more information.





**CITY OF SEATTLE PERSONNEL DEPARTMENT
Classification/Compensation Unit**

**ABBREVIATED
POSITION DESCRIPTION QUESTIONNAIRE**

(This form is to be used for vacant positions and/or requests resulting from reorganizations)

DEPARTMENT/DIVISION: City Light / South Distribution Design

POSITION NUMBER: 012619

DATE REQUESTED: January 8, 1998

EFFECTIVE DATE: April 1, 1998

CLASSIFICATION REQUESTED: Senior Electrical Engineer

POSITION PURPOSE: Supervises and performs the senior-level professional electrical engineering work in the planning, design, construction, operation, and maintenance of highly complex and visible projects which are usually of high priorities, in the hundreds of thousands of dollars range, and have both customer service and system reliability implications. The employee in this position is required to have an extensive knowledge of the principles, practices, and procedures of electrical engineering and construction and the ability to coordinate the efforts of a multi-discipline, multi-agency project team in order to perform the duties.

POSITION SUMMARY: Use the following space to summarize the essential duties and responsibilities assigned to the position. Briefly describe the work using action words.

Duties and Responsibilities Statements	% of Time
1. Plan and design complex work orders, including but not limited to electrical service design and installations for large and complex customer projects, 26kV conversions, distribution system improvements, etc. Supervise the testing of electrical systems, equipment facilities, and materials to determine performance and efficiency. Prepare specifications and perform evaluation of bids for new equipment.	30
2. Direct the planning and design of the electrical distribution system, within a specific area, to take care of the annual increase of the electrical load, and to maintain an efficient, balanced system to provide continuity of electrical service. Supervise the development and updating of computer analysis programs or tracking systems for appropriate projects. Supervise the survey of sites, determination of design needs, or resolution of design and location problems of equipment.	20
3. Plan, provide guidance, schedule, and check individual work assignments for fellow engineers. Prioritize projects and monitor project scopes and progression to ensure that they are within scope, on time, and within budget. Bring to the attention of and discuss with supervisors and upper management for any exceptions. Serve as divisional reviewer of final plans, specifications, and agreements. Coordinate the work of electrical contractors, affected public agencies, private entities, and utility crews.	20



- 4. Interpret policies. Assist in setting policy where none applies. Assure that stated policies are implemented and that responses are consistent in similar situations with different customers. 10
- 5. Establish criteria for checking work of fellow employees including, but not limited to, design specialists, engineers, and/or professionals of other disciplines. Check work prior to and after sketching. Approve out-going work orders, plans, letters, drawings, memos, etc. as assigned. 5
- 6. Work with employees and supervisors within own unit/branch as well as those in other units/branches to establish routines or policies to smooth operational problems, avoid duplication of efforts, and encourage teamwork. Provide technical guidance to fellow engineers and employees of other groups/divisions. 5
- 7. Coordinate and review designs, plans, documents, work, etc. submitted by consultants, contractors, architects, engineers, manufacturers, etc. for not only the large, complex, and visible projects but also the smaller ones to ensure that City Light's design guidelines and service requirements are met. Write misc. memos, reports, etc. in response to assignments as directed by the unit supervisor, manager, and division director. Coordinate and prepare progress and final reports and estimates. 10

POSITION ALLOCATION CRITERIA:

Duty No. 1 — A primary secondary duty, is described in the class specification as:

- Supervises or serves as project engineer/coordinator on exceptionally difficult and technically sophisticated projects in the selection, procurement, installation, testing, acceptance, operation, and maintenance of electrical power distribution facilities.
- Supervises and/or designs, plans, and determines requirements for the installation, maintenance, restoration and/or relocation of technically difficult distribution/transmission and overhead and underground primary and secondary electrical services.
- Supervises and/or performs highly complex detailed design work for equipment installation, system construction, or facility projects.
- Reviews final plans, specifications, and agreements and coordinates the work of electrical contractors, affected public agencies, and utility crews.
- Monitors progress of construction projects.
- Coordinates and reviews the work submitted by consultants and manufacturers.
- Conducts tests of electrical systems, equipment facilities, and materials to determine performance and efficiency.
- Prepares specifications and evaluates bids for new equipment.
- Prepares progress and final reports and estimates



Duty No. 2 — A primary secondary duty, is described in the class specification as:

- Supervises or serves as project engineer/coordinator on exceptionally difficult and technically sophisticated projects in the selection, procurement, installation, testing, acceptance, operation, and maintenance of electrical power distribution facilities.
- Supervises and/or performs highly complex detailed design work for equipment installation, system construction, or facility projects.
- Supervises and/or prepares preliminary and long-range plans, estimates, budgets, material requirements, detail final plans, specifications, work orders and instructions, customer instructions and schedules, operating and maintenance instructions, special conditions and agreements.
- Reviews final plans, specifications, and agreements and coordinates the work of electrical contractors, affected public agencies, and utility crews.
- Provides instructions to field crews and answer questions concerning design issues.
- Develops and updates computer analysis programs or tracking systems for appropriate projects.
- Surveys sites, determines design needs or problems and determines the location of equipment.
- Supervises or prepares drawings of plans and details manually or with computer-aided drafting and design applications.

Duty No. 3 — A primary secondary duty, is described in the class specification as:

- Supervises or serves as project engineer/coordinator on exceptionally difficult and technically sophisticated projects in the selection, procurement, installation, testing, acceptance, operation, and maintenance of electrical power distribution facilities.
- Supervises and/or performs highly complex detailed design work for equipment installation, system construction, or facility projects.
- Supervises and/or designs, plans, and determines requirements for the installation, maintenance, restoration and/or relocation of technically difficult distribution/transmission and overhead and underground primary and secondary electrical services.
- Serves as a technical expert in an electrical engineering specialty area.
- Supervises and/or prepares preliminary and long-range plans, estimates, budgets, material requirements, detail final plans, specifications, work orders and instructions, customer instructions and schedules, operating and maintenance instructions, special conditions and agreements.
- Reviews final plans, specifications, and agreements and coordinates the work of electrical contractors, affected public agencies, and utility crews.
- Monitors progress of construction projects.
- Coordinates and reviews the work submitted by consultants and manufacturers.
- Develops and updates computer analysis programs or tracking systems for appropriate projects.

Duty No. 4 — A primary secondary duty, is described in the class specification as:

- Supervises and/or designs, plans, and determines requirements for the installation, maintenance, restoration and/or relocation of technically difficult distribution/transmission and overhead and underground primary and secondary electrical services.
- Reviews final plans, specifications, and agreements and coordinates the work of electrical contractors, affected public agencies, and utility crews.
- Serves as a technical expert in an electrical engineering specialty area.
- Approves contract change orders and payments.

Duty No. 5 — A primary secondary duty, is described in the class specification as:

- Supervises and/or designs, plans, and determines requirements for the installation, maintenance, restoration and/or relocation of technically difficult distribution/transmission and overhead and underground primary and secondary electrical services.
- Supervises and/or prepares preliminary and long-range plans, estimates, budgets, material requirements, detail final plans, specifications, work orders and instructions, customer instructions and schedules, operating and maintenance instructions, special conditions and agreements.
- Serves as a technical expert in an electrical engineering specialty area.
- Prepares progress and final reports and estimates.

Duty No. 6 — A primary secondary duty, is described in the class specification as:

- Supervises and/or designs, plans, and determines requirements for the installation, maintenance, restoration and/or relocation of technically difficult distribution/transmission and overhead and underground primary and secondary electrical services.
- Serves as a technical expert in an electrical engineering specialty area.
- Makes presentations and acts as team leader on special projects as assigned.

Duty No. 7 — A primary secondary duty, is described in the class specification as:

- Supervises and/or designs, plans, and determines requirements for the installation, maintenance, restoration and/or relocation of technically difficult distribution/transmission and overhead and underground primary and secondary electrical services.
- Reviews final plans, specifications, and agreements and coordinates the work of electrical contractors, affected public agencies, and utility crews.
- Serves as a technical expert in an electrical engineering specialty area.
- Approves contract change orders and payments.
- Coordinates and reviews the work submitted by consultants and manufacturers.
- Makes presentations and acts as team leader on special projects as assigned.
- Prepares progress and final reports and estimates



REASON FOR THE REQUESTED CHANGE:

The Department has been notified of some highly complex and visible projects that will take place in the south distribution system area in the future. Engineering resources are needed to meet the customers' demand of preliminary engineering designs and estimates. The notable ones are the new Football Stadium, Regional Transit System, Port of Seattle Terminal 18 Redevelopment, South Downtown/King Street Station Area Redevelopment, Todd Shipyard expansion, etc. Reclassifying this position will allow the Unit to hire the right level engineer with the knowledge and experience to perform design work for the aforementioned projects and the future ones with similar level of complexity and visibility. It will also add flexibility to the Unit as the employee in this position can help to lead, train, and direct lower level engineers to accomplish tasks to meet Unit, Division, and Department goals.

Francis Tong January 14, 1998
Supervisor or Requester Signature Date

Jane Kral 1/14/98
Department Head Signature Date



For Personnel Use Only

POSITION NUMBER: 012619 TITLE: Electrical Engineer, Senior

APPROVED AS REQUESTED: Yes No

OTHER RECOMMENDED ACTION:

Jane Thompson
Personnel Analyst Signature

7/30/98
Date

John Bean
Personnel Analyst Supervisor Signature

8/4/98
Date





CLASSIFICATION DETERMINATION REPORT

Date: August 4, 1998		Report No.: 98-1866	
POSITION IDENTIFICATION			
Department:	City Light		
Classification Title:	Public Relations Specialist		
Ordinance Title:	Public Relations Specialist		
Position Number:	019239		
Bargaining Unit:	030	Current Salary:	\$17.22 - 20.04 (Range:29.0A)
RECOMMENDED ACTION			
Classification Title:	Public Relations Specialist, Senior		
Ordinance Title:	Public Relations Specialist, Senior		
Legislation Required:	Yes		
Bargaining Unit:	030	Recommended Salary:	\$20.04 - 23.35 (Range: 33.0A)
Remarks:	Reclassification Effective: May 1, 1995		
INCUMBENT STATUS			
Incumbent:			
Current Standing:	Public Relations Specialist		
Recommended Standing:	Public Relations Specialist, Senior		
In recommended standing, incumbent status is:			
<input type="checkbox"/> Regular	<input type="checkbox"/> Probationary	<input checked="" type="checkbox"/> Temporary	
Authority: Personnel Rule			
<input type="checkbox"/> 2.3100	<input type="checkbox"/> 2.3.200	<input checked="" type="checkbox"/> 2.3.300	

Recommended: Team B *ADS* Classification Analyst(s)

Approved: John Pearson *JP* Classification Supervisor

Lidia Santiesteban *LS* Classification/Compensation Director

Norma McKinney *NM* Personnel Director



Position Identification And Source Of Request

The subject position (#019239) is being reviewed at the request of the current incumbent. This position is located within the Customer Information Unit of the Customer Relations Division within the City Light Department.

The Customer Information Unit develops and implements the communication planning methodology for the department. This Unit also prepares analysis, develops and administers consultant contracts; and manages the implementation of a portion of the department's business plan and strategic communication plan.

Scope of Review:

A team of Classification Analysts (*Gail Thompson, Carla Coward, SharonLee Nicholson and Carl Swanson*) conducted this review. The review consisted of an analysis and evaluation of the following:

- the Position Description Questionnaire (PDQ) dated December 5, 1997;
- a task list completed by the incumbent;
- class specifications in the Planning and Development Specialist and Public Relations class series;
- comparison to similar positions throughout the City allocated to the journey and senior levels of the above mentioned class series;
- discussions with the position incumbent;
- review of the organization unit;
- position history records and related classification files.

Summary of Work

According to the PDQ, the subject position is primarily responsible for leading all communication efforts between customers, community groups, organizations, schools, businesses and City agencies regarding planned service interruptions. This position also has the discretion to mediate and resolve conflicts and to recommend canceling or delaying certain service interruptions.

Specific tasks include:

- ⇒ meeting with engineers, crew chiefs and contractors to determine their schedules and project requirements;
- ⇒ planning and developing a strategy for approaching the community regarding planned projects;
- ⇒ contacting leaders of the community, businesses, residents, neighborhood service center coordinators and/or editors of local newspapers to notify them of the planned projects;
- ⇒ attending community meetings with the project engineer to provide an overview of, and to discuss, the project plans;
- ⇒ distributing notifications advising all affected customers of the projects and providing project updates on a continuous basis;
- ⇒ resolving customer issues arising from the projects, including recommending canceling and/or delaying.



NOTE: For a complete listing of the subject position's responsibilities, see the Position Description Questionnaire (PDQ) submitted for this review and included in the position file.

Class Concepts and Comparisons

Based on the incumbent's request, class specifications within the Planning and Development class series are being reviewed, along with those in the Public Relations class series. The concepts of work for these classes are described below:

Planning and Development Specialist

Positions assigned to the Planning and Development Specialist class series are primarily responsible for researching, gathering and analyzing data and preparing reports in support of planning activities related to a project, program, service, policy or issue, in areas such as conservation, recycling, parks and recreation, environmental and land use, etc.

Public Relations Specialist

Positions assigned to the Public Relations Specialist class series are responsible for planning, developing, preparing, distributing and/or evaluating a variety of public relations or involvement programs and materials; and for participating in planning, developing and implementing marketing strategies or public involvement plans for departmental projects and programs.

Analysis

The duties and responsibilities of the subject position are being reviewed to determine its appropriate classification. Review of the above concepts of work clearly indicate that the subject position is not responsible for preparing reports in support of planning activities related to programs, policies or issues, in areas such as conservation, recycling, parks and recreation, environmental and land use, etc. (*Planning and Development Specialist*). This review did determine that the primary focus of the subject position is that of public involvement work, which includes developing and implementing marketing strategies or public involvement plans for departmental projects and programs.

Based on the above review, the Public Relations Specialist class series appears to be the most relevant class series. The Public Relations Specialist class series consists of three levels, *journey, senior and supervisor*. Work assigned to journey level positions is somewhat narrow in scope and assignments are less complex and/or controversial than at the higher level. In comparison, work at the senior level entails lead responsibilities and/or the more complex, controversial and technically difficult projects, programs, issues or policies. Assignments at this level require greater discretion due to their controversial and/or sensitive nature. The supervisor level is distinguished by its supervisory role.



The body of work assigned to positions #016570, 018479, 019121, 019789, Public Relations Specialists was also compared to that of the subject position. The aforementioned positions are located within the same work unit as the subject position. They were last reviewed on August 6, 1998. It was determined at that time that the work assigned to these positions is typical of journey level Public Relations Specialist work. The work of these positions also involves providing a means to communicate the department's official public position internally and externally. Responsibilities include, but are not limited to, employee communications, production of communication and marketing materials, public participation, media relations, and issue management.

I found that while the aforementioned positions appear to be performing work similar to that of the subject position, the work differs in these areas:

1. the **overall scope and level of responsibility** assigned to the subject position. Position #019239 is the only position within the work unit assigned to the power outages program. Attendance is required at pre-planning meetings with project engineers, crew chiefs and contractors. From these meetings the subject incumbent plans and develops strategies for approaching community leaders, business owners and residents with information that could be perceived as negatively impacting their lives and livelihood.
2. the **impact of decisions and consequence of error**. The subject position negotiates and recommends the delay and/or canceling of planned service interruptions. This position works independently with internal/external customers and is responsible for making decisions, such as recommending the delay or canceling of planned service interruptions. Decisions made by this positions can be extremely costly to the utility and its customers, in either time, money or goodwill.

The overall responsibility of position #019239 is to ensure that the community, businesses and residents are well prepared to deal with planned power outages. The subject position works closely with internal/external customers to disseminate information, respond to questions/requests, and to negotiate/recommend changes to planned service interruption projects. The subject position routinely makes independent decisions that can be extremely costly. In comparison, the four Public Relations Specialist positions do not possess the same level of responsibility. They work closely with internal/external customers in a coordinative role (*i.e., serving on the planning team and coordinating the strategic communication proposal/plan; developing campaign strategy; acting as lead in redesigning and editing the employee newsletter; serving as newsletter editor and writer; developing marketing and advertising packets*) to collaboratively reach a consensus or to make recommendation regarding a project or program.



The duties of the subject position as described above, indicate that the work assigned to the subject position is beyond that typically expected of journey level positions. Journey level positions are not involved in making decisions of a sensitive and/or controversial nature which can be extremely costly to the utility (*negotiating, delaying and/or canceling service interruptions; communicating changes; planning and developing strategies; resolving issues arising from projects*), nor are they the primary media spokesperson.

Conclusion

The above review revealed that the scope and level of responsibility, the impact of decisions, and the consequence of error assigned to the subject position are much broader than those assigned to the four Public Relations Specialist positions. Projects assigned to the subject position are of a sensitive and/or controversial nature, and decisions made can be costly to the utility and customers.

Recommendation

It is therefore, recommended that the subject position be reclassified to the title of Public Relations Specialist, Senior. This action is to become effective May 1, 1995, the date that management certifies that the duties became effective.

Costing

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action would be \$37,723.48. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be \$8,055.79. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: June 18, 1998		Report No.: 98-1924
POSITION IDENTIFICATION		
Department:	City Light	
Classification Title:	Assistant Credit and Collections Supervisor	
Ordinance Title:	Assistant Credit and Collections Supervisor	
Position Number:	022226	
Bargaining Unit:	031	Current Salary: \$17.86 - 20.85 (Range:30.0A)
RECOMMENDED ACTION		
Classification Title:	Credit and Collections Supervisor	
Ordinance Title:	Credit and Collections Supervisor	
Legislation Required:	Yes	
Bargaining Unit:	030	Recommended Salary: \$20.04 - 23.35 (Range: 33.0A)
Remarks	See next page for pertinent allocation information	
INCUMBENT STATUS		
Incumbent:		
Current Standing:	Assistant Credit and Collections Supervisor	
Recommended Standing:	Credit and Collections Supervisor	
In recommended standing, incumbent status is:		
<input checked="" type="checkbox"/> Regular	<input type="checkbox"/> Probationary	<input type="checkbox"/> Temporary
Authority: Personnel Rule		
<input type="checkbox"/> 2.3100	<input checked="" type="checkbox"/> 2.3.200	<input type="checkbox"/> 2.3.300
Remarks:	Per Article IX, Section 9.7b of the Local Bargaining Agreement	

Recommended: Team B *JAS* Classification Analyst(s)

Approved: John Pearson *JP* Classification Supervisor

Lidia Santiesteban *LS* Classification/Compensation Director

Norma McKinney Personnel Director



Position Identification And Source Of Request

Position # 022226 is located in the Accounts Services Division of the City Light Department. It is being reviewed as a result of an out-of-class expedited grievance filed by Local 17 on behalf of the incumbent. Local 17 alleges the incumbent is working outside of her classification and is requesting reclassifying this position to the title of Credit and Collections Supervisor.

Background

According to departmental management, the subject position was one of two Assistant Credit and Collections Supervisors responsible for overseeing the Credit and Collections Unit within the department. However, as a result of a reorganization, it is currently the only Assistant Credit and Collection Supervisor assigned to the Unit.

Scope of Review:

This review was conducted by Gail Thompson, a Classification Analyst assigned to Team 2. This review consisted of an analysis and evaluation of the following:

- ◆ the Position Description Questionnaire (PDQ) dated May 15, 1997;
- ◆ the Credit and Collections Supervisor and Assistant Credit and Collections Supervisor class specifications;
- ◆ review of the subject position's organization unit;
- ◆ position history records and related classification files.

Summary of Work

The essential purpose of this position is to supervise the day-to-day functions of the Credit and Collections unit. For purposes of this review, the work of the subject position was compared to that characterized by the class specifications of Assistant Credit and Collections Supervisor and Credit and Collections Supervisor. The work of these classes are characterized as follows:

Assistant Credit and Collections Supervisor

Positions in this class supervise staff engaged in delinquent utility accounts collection assignments, establish payment plans and terminate services; and monitor work operations to ensure work is performed according to applicable codes, ordinances, policies and procedures.

Credit and Collections Supervisor

Positions in this class supervise a credit and collection function for a utility. They plan, schedule and direct the work of subordinates engaged in office and field collection activities and ensure compliance with applicable laws, ordinances, policies and procedures to maintain account delinquencies within acceptable limits.



The work of the Assistant Credit and Collections Supervisor class is distinguished from the Credit and Collections Supervisor class by the latter's overall authority for the work unit, including overseeing the work of subordinate personnel.

NOTE: For a complete listing of the subject position's responsibilities, see the Position Description Questionnaire (PDQ) submitted for this review and included in the position file.

Analysis:

According to the PDQ submitted for this review, the subject position is responsible for overseeing the work of the entire work Unit. Duties include: hiring, planning, scheduling and directing the work of subordinate staff; evaluating and prioritizing the daily workload; researching and preparing responses to billing complaints, disputes and damage claims; formulating and assisting with the Unit's annual budget; and preparing a variety of reports.

Review of the above duties and responsibilities indicated that the body of work assigned to the subject position is *no longer* that of an Assistant Credit and Collections Supervisor. The work of this position is best described within the Credit and Collections Supervisor class specification (*having the overall authority for the work unit, including overseeing the work of subordinate personnel*).

Recommend

We recommend that the subject position be reclassified to the title of Credit and Collections Supervisor. This action should become effective May 8, 1998, fifteen (15) working days prior to the filing of this grievance.

Costing

If implemented on the 1998 Third Quarter Ordinance, the maximum estimated cost of implementing this action would be \$10,647.76. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be \$6,084.43. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.



CLASSIFICATION DETERMINATION REPORT

Date:		Report No.: 98-1981
<u>POSITION IDENTIFICATION</u>		
Department:	City Light	
Classification Title:	See Exhibit A	
Ordinance Title:	See Exhibit A	
Position Number:	See Exhibit A	
Bargaining Unit:	See Exhibit A	Current Salary: \$ See Exhibit A
<u>RECOMMENDED ACTION</u>		
Classification Title:	See Exhibit A	
Ordinance Title:	See Exhibit A	
Legislation Required:	See Exhibit A	
Bargaining Unit:	See Exhibit A	Recommended Salary: See Exhibit A
Remarks	See next page for pertinent allocation information	
<u>INCUMBENT STATUS</u>		
Incumbent:	See Exhibit A	
Current Standing:	See Exhibit A	
Recommended Standing:	See Exhibit A	
In recommended standing, incumbent status is:		
<input type="checkbox"/> Regular	<input type="checkbox"/> Probationary	<input type="checkbox"/> Temporary
Authority: Personnel Rule		
<input type="checkbox"/> 2.3100	<input type="checkbox"/> 2.3.200	<input type="checkbox"/> 2.3.300

Recommended: Team 2 *chc* Classification Analyst(s)

Approved: John Pearson *J.P.* Classification Supervisor

Lidia Santiesteban *LS* Classification/Compensation Director

Norma McKinney *NM* Personnel Director



CLASSIFICATION DETERMINATION

EXHIBIT A

REPORT NO.: 98-1981

RECOMMENDED SALARY: \$14:00 - 15.66 (Range: 22.5A)

RECOMMENDED ORDINANCE TITLE:

Administrative Specialist II

RECOMMENDED CLASSIFICATION TITLE:

Administrative Specialist II - BU

No Change

Incumbent:

Position No.: 012464

Current Classification Title: Administrative Specialist II

Current Ordinance Title: Administrative Specialist II - BU

Bargaining Unit: 035 Current Salary: \$14.00 - 15.66 Range: (22.5B)

Recommended Status: No Change

No Change

Incumbent:

Position No.: 012560

Current Classification Title: Administrative Specialist II

Current Ordinance Title: Administrative Specialist II - BU

Bargaining Unit: 035 Current Salary: \$14.00 - 15.66 Range: (22.5B)

Recommended Status: No Change

Reclassified effective May 11, 1998

Incumbent:

Position No.: 017367

Current Classification Title: Administrative Support Assistant

Current Ordinance Title: Administrative Support Assistant

Bargaining Unit: 035 Current Salary: \$11.82 - 13.26 Range: (18.0B)

Recommended Status: Regular

Remarks: Remarks: Per Article IX, Section 9.6b(2) of the Local Bargaining Agreement.



Position Identification And Source Of Request:

Positions # 012464, 012560 and 017367 are located within the Credit and Collection Unit of the Account Services Division within the City Light Department. This Unit is responsible for administering City Light's emergency low income funds and certifying utility rate assistance for low income families.

The subject positions are being reviewed as a result of a grievance filed by Local 17 on their behalf. Local 17 alleges that the subject positions have been working outside of their classification as Program Intake Representatives and should be reclassified as such.

Background:

The group PDQ submitted for review indicated that changes were made to the Low Income Assistant Program. According to management, the program changes are mainly internal. One change involves the process in which City Light staff interview customers to determine program eligibility. Staff previously scheduled appointments and interviewed customers at the Utility. The process has changed so that customers are now interviewed over the telephone and supporting documentation is sent to City Light through the mail.

The second change involves the Low Income Rate Assistance Program(LIRA). This program was previously handled by staff at the Department of Housing and Human Services. This program and process were transferred to City Light. Customers applying for the LIRA Program are also interviewed over the telephone, and they can also apply for the Emergency Low Income Assistance program (ELIA) Program during the interview. Management states that these changes have resulted in a quicker turn-around time for City Light's customers.

Scope of Review:

A team of Classification Analysts (*Gail Thompson, Carla Coward, SharonLee Nicholson and Carl Swanson*) conducted this review. The review consisted of an analysis and evaluation of the following.

- ◆ the Position Description Questionnaire (PDQ) dated May 15, 1997;
- ◆ class specifications in the Program Intake Representative, Customer Service Representative and Administrative Specialist class series;
- ◆ comparison to similar positions;
- ◆ review of the organization unit affecting the subject positions;
- ◆ position history records and related classification files.



Summary of Work

The essential purpose of these positions is to interview customers to determine eligibility for energy and low income utility rate assistance programs.

Specific tasks include:

- ◆ Negotiating payment arrangement on delinquent active electric bills;
- ◆ Making referrals to other energy assistance programs;
- ◆ Interacting with other energy assistance and social service programs;
- ◆ Processing and following-up on pledge payments and resolving billing disputes;
- ◆ Opening and closing accounts;
- ◆ Verifying, and making corrections, adjustments and rebate changes;
- ◆ Explaining billing and transactions; and
- ◆ Maintaining and updating customer data.

NOTE: For a complete listing of the subject position's responsibilities, see the Position Description Questionnaire (PDQ), and submitted for purposes of this review.

Class Concepts and Comparisons

The following class specifications were chosen for this review.

Program Intake Representative (PIR)

Positions allocated to this class work within the Human Services Program area. They serve as mini counselors and are responsible for assessing their client's employability, identifying barriers to employment or education, developing a case plan, and coordinating services to remove barriers.

This is a stand alone class. The work of PIR class differs from the subject positions in that the latter's customer contact is strictly for determining eligibility for defined energy and low income utility rate assistant programs, rather than for human service programs.

Customer Service Representative (CSR)

Positions allocated to this class are responsible for opening, maintaining and closing commercial and residential customer utility accounts. This is the first level in a four class series. The work of this class differs from the subject positions in that the former is expected use independent judgment in making limited credit arrangements, taking appropriate action to resolve account problems and in preparing documents to adjust accounts based on corrected customer information.



Administrative Specialist II

Positions in this class perform the full range of administrative support functions for high level management or perform specialized tasks in support of a special function or program. This is the senior level within the Administrative Support class series. Incumbents at this level are expected to perform a variety of complex and responsible support work with minimum guidance. They may also be expected to perform factual research and evaluation, and make reliable decisions which have the potential for significant time or monetary loss in case of error.

Work within the Administrative Specialist II class specification appears to be consistent with that characterized in the group PDQ. According to the group PDQ, the subject positions perform specialized task in support of low income assistant programs. Incumbents are expected to use limited judgment and make decisions within established programs guidelines and procedures.

Analysis

Positions #012464 (*Helen Sawyer*) and 012560 (*Eduardo Sidoine*) were last reviewed in 1992 and at that time allocated to the classification title of Administrative Specialist II (*please see class report #89-90 for a list of duties*). Position #017367 (*Margitta Graumann*) was reviewed last in 1987 and allocated to the title of Administrative Support Assistant (*please see class report #166-86 for a list of duties*).

After carefully reviewing and comparing the work defined within the above mentioned reports and PDQs, it was determined that the duties and responsibilities of the 1992 and 1998 PDQs are very closely related. In fact, the preponderance of duties (80%) continues to be those assigned, identified and classified in 1992 as Administrative Specialist II by Determination Report #89-90.

Below is a comparison of the 1992 and 1998 descriptions of work:

- | | | |
|------|------|---|
| 1992 | 1998 | Interview utility customers, by telephone and in person, to provide information about financial assistance policies and procedures and to determine eligibility for assistance. (50%) |
| 1992 | 1998 | Review Emergency Low Income Assistance Program applications for completeness and accuracy. (15%) |
| 1992 | 1998 | Enter payment arrangements, revisions, interview outcomes and pledge information into the program computer; assist with processing pledge checks from energy assistance agencies. (15%) |



The following description of work is from the group PDQ submitted for review. These duties were the only duties not represented in the 1992 PDQ.

1998 Based on customer's documentation, determine acceptance or denial of assistance; refer customer to other agencies; make mutually acceptable payment arrangements; and take appropriate action to resolve delinquent accounts. (15%)

1998 Provide interpreter service for non-English speaking customers. (5%)

The above review revealed that the manner in which the subject positions process work has changed, however, the level, scope and range continues to be that identified and classified as ASII 1992. And, although a new program has been added, it is also of the same type, level and scope of work performed through the ELIA Program. The only substantial change to this body of work is the manner in which customers are interviewed (*telephone vs. in person*).

Recommendation:

Therefore, the following is recommended:

- 1) that positions #012464 and #012560 remain in their current classifications of Administrative Specialist II; and
- 2) that position #017367 be reclassified to the title of Administrative Specialist II. This action should become effective May 11, 1998, which is 15 working days prior to the initial filing of the grievance.

This position is currently receiving out-of-class pay as an Administrative Specialist II. Please note, out-of-class pay has no bearing on this recommendation).

Costing

Position #017367

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action would be \$9,735.09. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be \$5,841.05. The calculations are based on the difference between the top step of the current and the recommended salary range and include statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.

Position #012560 and 012464

There are no costs associated with implementing the above action for these positions.





CLASSIFICATION DETERMINATION REPORT

Date: August 10, 1998		Report No.: 98-1982
<u>POSITION IDENTIFICATION</u>		
Department:	City Light	
Classification Title:	See Exhibit A	
Ordinance Title:	See Exhibit A	
Position Number:	See Exhibit A	
Bargaining Unit:	See Exhibit A	Current Salary: \$ See Exhibit A
<u>RECOMMENDED ACTION</u>		
Classification Title:	See Exhibit A	
Ordinance Title:	See Exhibit A	
Legislation Required:	See Exhibit A	
Bargaining Unit:	See Exhibit A	Recommended Salary: See Exhibit A
Remarks		
<u>INCUMBENT STATUS</u>		
Incumbent:	See Exhibit A	
Current Standing:	See Exhibit A	
Recommended Standing:	See Exhibit A	
In recommended standing, incumbent status is:		
<input checked="" type="checkbox"/> Regular	<input type="checkbox"/> Probationary	<input type="checkbox"/> Temporary
Authority: Personnel Rule		
<input type="checkbox"/> 2.3100	<input type="checkbox"/> 2.3.200	<input type="checkbox"/> 2.3.300
Per Article IX, Section 9.7(b.1) of the Local Bargaining Agreement		

Recommended:

Team 2 

Classification Analyst(s)

Approved:

John Pearson 

Classification Supervisor

Lidia Santiesteban 

Classification/Compensation Director

Norma McKinney 

Personnel Director



CLASSIFICATION DETERMINATION

EXHIBIT A

REPORT NO.: 98-1982

RECOMMENDED SALARY: \$14.00 - 15.66 (Range: 22.5B)

RECOMMENDED ORDINANCE TITLE:

Administrative Specialist II-BU

RECOMMENDED CLASSIFICATION TITLE:

Administrative Specialist II

Reclassified effective May 11, 1998, per Article 9, Section 9.7(b)

Incumbent:

Position No.: 012390

Current Classification Title: Accounting Support Assistant

Current Ordinance Title: Accounting Support Assistant - BU

Bargaining Unit: 035 Current Salary: \$11.82 - 13.26 Range: (18.0B)

Recommended Status: Regular

Incumbent:

Position No.: 019391

Current Classification Title: Administrative Specialist I

Current Ordinance Title: Administrative Specialist I - BU

Bargaining Unit: 035 Current Salary: \$13.01 - 14.51 Range: (20.5B)

Recommended Status: Regular

Incumbent:

Position No.: 012394

Current Classification Title: Accounting Technician I

Current Ordinance Title: Accounting Technician I - BU

Bargaining Unit: 035 Current Salary: \$13.01 - 14.51 Range: (20.5B)

Recommended Status: Regular

Incumbent:

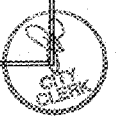
Position No.: 013941

Current Classification Title: Administrative Specialist I

Current Ordinance Title: Administrative Specialist I - BU

Bargaining Unit: 035 Current Salary: \$13.01 - 14.51 Range: (20.5B)

Recommended Status: Regular



Position Identification and Source Of Request

Positions #012390, 012394, 013941, 019391 are located in the Credit and Collections Unit of the City Light Department. This work unit is responsible for collecting on final delinquent electrical bills.

Background:

These positions are being reviewed as a result of an expedited grievance filed on their behalf by Local 17. This bargaining unit alleges that the subject incumbents are working outside of their current classification. The title being requested is Accounting Technician II (*or a higher title*).

Scope of Review:

This review was conducted by Gail Thompson, a Classification Analyst assigned to Team 2. The review consisted of an analysis and evaluation of the following:

- ◆ the Position Description Questionnaire (PDQ) dated May 15, 1997;
- ◆ class specifications in the Accounting Technician and Administrative Support class series;
- ◆ comparison to similar positions throughout the City allocated to the above mentioned class series;
- ◆ discussions with the position incumbents;
- ◆ review of the subject positions' organization unit;
- ◆ position history records and related classification files.

Summary of Work

The essential purpose of these positions is to collect on final delinquent electric bills. The position's primary duties include:

- researching and evaluating electrical records to locate the appropriate customer to contact;
- making limited payment arrangements, with residential, commercial and industrial customers regarding their final delinquent electric bill;
- referring delinquent accounts to designated collection agency;
- maintaining and updating customer database.

NOTE: For a complete listing of the subject position's responsibilities, see the Position Description Questionnaire (PDQ) submitted for this review and included in the position file.



Class Concepts and Comparisons

Based on the request of Local 17, the classification title of Accounting Technician II is being reviewed, along with that of Administrative Specialist II. The concepts of work for these senior level classes are described below:

Accounting Technician II (ATII)

Positions perform the full range of *accounting records* maintenance activities for an assigned area or a set of records, such as payroll, accounts receivable, account payable, purchasing.

Administrative Specialist II (ASII)

Positions perform the full range of administrative support duties for high level management or *specialized tasks in support of a special function or program*.

Analysis

Positions assigned to the senior level within the Accounting Technician class series typically work independently, performing the full range of multiple, complex and responsible *accounting* support tasks, such as independently processing invoices, posting accounts, reconciling ledger transactions and discrepancies, preparing and reviewing account transactions and customer billings. Senior level positions within the Administrative Support class series also perform the full range of multiple, complex and responsible (ASII) *administrative* support tasks and work independently, with minimal guidance. Some work assignments at this level require handling complicated tasks where the cost of correcting errors would be substantial in either time or money.

According to Local 17, the body of work performed by these positions should be classified at the senior level (*ATIII*) within the Accounting Technician class series. While I agree that the subject positions are performing work at the senior level, I disagree that it is related to the Accounting Technician class series. Work tasks assigned to the subject positions -- *reviewing records and verifying the amount owed; contacting the customer (by telephone and/or in writing); making limited payment arrangements; providing follow-up; and forwarding record to the designated collection agency*. -- are all administrative tasks performed in support of Billing Finals.

After reviewing the submitted PDQ, and individual discussion with position incumbents, I agree that the work has expanded since its last review. Position incumbents are currently expected to perform specialized tasks in support of a specific program (*Billing Finals -- from inception, until submission to the collection agency*). Management also agrees with this observation. According to management, prior to the implementation of the Credit Management System (CMS), staff was assigned varying degrees of work complexity. However, with the implementation of CMS, staff began performing work at the same level, range and scope.



Conclusion

Based on discussions with position incumbents, and comments submitted by management and Local 17, it is clear that the work performed by these positions has expanded. The work is no longer allocated in varying degrees of complexity. Each position incumbent is expected to perform work at the same level, scope and range. The overall body of work described within the PDQ is also consistent with that characterized in the Administrative Specialist II class specification (*performing the full range of support activities in support of a special program or function, i.e., Billing Finals*).

Recommendation

It is therefore, recommended that the subject positions be reclassified to the title of **Administrative Specialist II**. This action should become effective May 11, 1998, 15 working days prior to the initial filing of grievance.

Costing

Positions #019391 & 013941 (Administrative Specialist I)

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action would be \$9,329.46. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be \$5,597.68. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.

Position #012394 (Accounting Technician I)

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action would be \$4,664.73. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be \$2,798.84. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.

Position #012390 (Accounting Support Assistant)

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action would be \$9,735.09. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be \$5,841.05. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: September 8, 1998 Report No.: 98-2045

POSITION IDENTIFICATION
Department: City Light
Classification Title: Administrative Support Assistant
Ordinance Title: Administrative Support Assistant - BU
Position Number: 012468
Bargaining Unit: 035 Current Salary: \$11.82 - \$13.26 Range: 18.0B

RECOMMENDED ACTION
Classification Title: Engineering Aide
Ordinance Title: Engineering Aide
Legislation Required: Yes
Bargaining Unit: 004 Recommended Salary: \$14.37 - \$16.73 Range: n/a
Remarks: Reallocation effective 10/6/98 - position is vacant

ANALYSIS AND RECOMMENDATION
Per the submitted Abbreviated PDQ, the position under review is now performing technical rather than clerical support work. The duties match the class specification for Engineering Aide. I therefore recommend that this vacant position be reallocated to Engineering Aide effective 10/6/98 as requested by the department.

Recommended: Team 1 shj Classification/Compensation Analyst(s)
Approved: Edie Jorgensen eb Classification/Compensation Supervisor
Lidia Santiesteban LRS Classification/Compensation Director
Norma McKinney GAN Personnel Director



For Personnel Use Only

POSITION NUMBER: 012468 TITLE: Engineering Aide

APPROVED AS REQUESTED: Yes No

OTHER RECOMMENDED ACTION:

Effective 10/6/98

Dusie Hansen Farrell
Personnel Analyst Signature

9-8-98

Date

Personnel Analyst Supervisor Signature

Date



CITY OF SEATTLE PERSONNEL DEPARTMENT
Classification/Compensation Unit

RECEIVED
 CLASS. COMP.
 JUL 07 1998
 FILE #

**ABBREVIATED
 POSITION DESCRIPTION QUESTIONNAIRE**

(This form is to be used for vacant positions and/or requests resulting from reorganizations)

DEPARTMENT/DIVISION: Light, OU 363

POSITION NUMBER: 012468

DATE REQUESTED: 6/24/98 **EFFECTIVE DATE:** 10/6/98

CLASSIFICATION REQUESTED: Engineering Aide

POSITION PURPOSE: Maintain databases and performs elementary technical work

POSITION SUMMARY: *Use the following space to summarize the essential duties and responsibilities assigned to the position. Briefly describe the work using action words.*

Duties and Responsibilities Statements	% of Time
1. Maintain transformer database and records system	40
2. Does elementary AutoCad drawings	10
3. Does elementary technical calculations and designs	10
4. Does limited GIS maintenance	10
5. Does problem resolution of data for various data systems	10
6. Prepares Job Order/Work Order packages for sending to field crews	10
7. Reproduction and distribution of maps and data products	10

POSITION ALLOCATION CRITERIA:

Duty No. 1 — A primary secondary duty, is described in the class specification as:

Engineering Aide

Duty No. 2 — A primary secondary duty, is described in the class specification as:

Engineering Aide

Duty No. 3 — A primary secondary duty, is described in the class specification as:

Engineering Aide

Duty No. 4 — A primary secondary duty, is described in the class specification as:

Engineering Aide

Duty No. 5 — A primary secondary duty, is described in the class specification as:

Engineering Aide

Duty No. 6 — A primary secondary duty, is described in the class specification as:

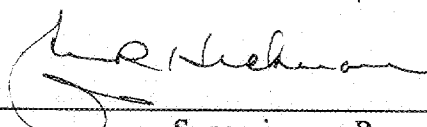
Engineering Aide

Duty No. 7 — A primary secondary duty, is described in the class specification as:

Engineering Aide

REASON FOR THE REQUESTED CHANGE:

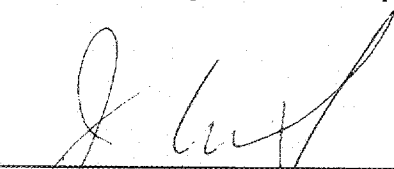
The work in this position is now almost all (a) computer (Oracle db) work, (b) elementary engineering technical and (c) engineering problem resolution. The change in work has made data entry a smaller part of the job with significant increases in engineering (engineering aide) type work.



Supervisor or Requester Signature

6-24-98

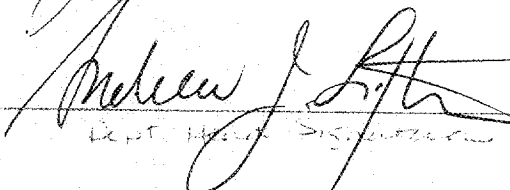
Date



Department Head Signature

4/24/98

Date



Department Head Signature

4/26/98

Date



CLASSIFICATION DETERMINATION REPORT

Date: September 30, 1998 Report No.: 98-2202A

POSITION IDENTIFICATION

Department: City Light
Classification Title: Accounting Technician I
Ordinance Title: Accounting Technician I -BU
Position Number: 012536
Bargaining Unit: 035 Current Salary: \$13.01 - 14.51 (Range 20.5B:)

RECOMMENDED ACTION

Classification Title: Administrative Specialist II
Ordinance Title: Administrative Specialist II-BU
Legislation Required: Yes
Bargaining Unit: 035 Recommended Salary: \$14.00 - 15.66 (Range: 22.5B)
Remarks: See 1999 Budget Request No. #044; Effective: 1/1/99

INCUMBENT STATUS

Incumbent:
Current Standing: Accounting Technician I
Recommended Standing: Administrative Specialist II
In recommended standing, incumbent status is:
 Regular Probationary Temporary

Authority: Personnel Rule

2.3100 2.3.200 2.3.300

Remarks: Remarks: Per Article IX, Section 9.7c of the Local 17 Bargaining Agreement

Recommended: Team 2 [Signature] Classification Analyst(s)

Approved: John Pearson [Signature] Classification Supervisor

Lidia Santiesteban [Signature] Classification/Compensation Director

Norma McKinney [Signature] Acting Personnel Director



Addendum (Log #2482) Report #98-2202A

This position was reviewed in the 1999 Budget, and the recommended allocation was Administrative Specialist I. This recommendation was appealed by the department, and a Reconsideration Hearing was held on September 29, 1998. The Reconsideration Board consisted of Lidia Santiesteban, Classification/Compensation Director, and Edie Jorgensen and John Pearson, Classification/Compensation Supervisors.

Additional information, in support of the Department's initial request, was presented at the hearing. According to departmental management the subject position works independently, and is expected to use judgment in resolving issues that could have a high consequence of error. This position also provides administrative support to two high level managers and their staff at the System Control Center (SCC). The SCC has three primary responsibilities 1) dispatching of generation and distribution, 2) development and maintenance of Energy Management System software/hardware, and 3) substation operations - monitoring the operation of electrical systems throughout the distribution area.

This position is primarily responsible for overseeing the daily administrative work; timekeeping for a very complex payroll system; composing correspondence; transcribing generation, transmission and distribution dispatcher trouble report logs chronologically; assisting with the bi-annual budget; and screening visitors and directing them to the appropriate personnel.

Recommendation

Based on documentation presented at the Hearing, the Reconsideration Board concurs that the subject position is performing work at a higher level than initially indicated. The Reconsideration Board, therefore, recommends the subject position be reallocated to the title of Administrative Specialist II. This action is effective January 1, 1999 to coincide with the implementation of the 1999 Budget.





CLASSIFICATION DETERMINATION REPORT

Date: September 3, 1998 Report No.: 98-2249

POSITION IDENTIFICATION
Department: CITY LIGHT
Classification Title: WAREHOUSER
Ordinance Title: WAREHOUSER-BU
Position Number: 014237
Bargaining Unit: 007 Current Salary: \$14.35--\$15.49 (Range: N/A)

RECOMMENDED ACTION
Classification Title: SENIOR WAREHOUSER
Ordinance Title: WAREHOUSER, SR-BU
Legislation Required: YES
Bargaining Unit: 007 Recommended Salary: \$15.81--\$17.05 (Range: N/A)
Remarks: Reclassification Effective May 5, 1998 (30 Days Prior to the date the Grievance was filed.)

INCUMBENT STATUS
Incumbent:
Current Standing: WAREHOUSER
Recommended Standing: SENIOR WAREHOUSER
In recommended standing, incumbent status is:
[X] Regular; [] Probationary; [] Temporary.
Authority: ~~Pers. Rule~~ Agreement between City of Seattle & Joint Crafts Council (Teamsters Local 117)
[] 2.3.100; [] 2.3.200; [] 2.3.300.
Remarks:

Recommended: 98Team2 *Jan Cho* Classification/Compensation Analyst(s)
Approved: John Pearson *JP* Classification/Compensation Supervisor
Lidia Santiesteban *LS* Classification/Compensation Director
Norma McKinney *NM* Personnel Director



Source of Request and Position Identification:

This position was reviewed as a result of Step 3 grievance for work out of class.

Position No. 014237 resides in the warehouse at the South Service Center of Seattle City Light. The position reports to the Crew Chief of the Toxic Unit in the South Warehouse. The primary function of this position's work group is to oversee the warehousing and disposal of PCB and dangerous waste.

Position History:

Detailed historical data of the position is available in the Personnel Division's Records Unit.

Scope of Review:

This review was conducted by members of Class/Comp 98Team2, consisting of Gail Thompson and SharonLee Nicholson. SharonLee wrote this report. The review of the subject position included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) submitted for this review;
- ◆ Class Spec No. 9156504 for *Warehouser*
- ◆ Class Spec No. 9156505 for *Senior Warehouser*

Summary of Work:

The essential purpose of this position is to lead the work of three warehouse workers in managing toxic waste and related materials. For example, these employees [a] sample electrical transformers for toxic waste before surplusing; [b] pump and decontaminate equipment and work areas; [c] process PCB-contaminated materials. This position spends about 60% of its time overseeing the work of the warehouse workers and 30% of its time in records and inventory management for PCB-contaminated materials, toxic waste in storage as well as identifying and labeling toxic materials for shipment.

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.

Analysis:

A comparison of the PDQ to the class specs for both the *Warehouser* and the *Senior Warehouser* revealed that the work of this position extends beyond the *Warehouser* spec. In the lower level, employees work under continuing supervision as they perform various warehousing tasks. Positions in the *Senior Warehouser* class receive general supervision as they lead the work of subordinate warehouse workers. The senior level also may be responsible for a small warehouse or be responsible for toxic materials (i.e., insure proper identification, storage, disposal and reporting of hazardous



materials) This position does not manage a small warehouse; however, it is responsible for a group of warehouse workers working with toxics.

Two elements of this position's activities differentiate the position from the lower level *Warehouse worker* classification: [a] leading the work of subordinates and [b] responsibility for toxic waste and hazardous material warehousing and reporting. Based on these two distinctions, Position No. 014237 is not currently classified appropriately.

Recommendation:

Therefore, based on the above analysis, we recommend the subject position be reclassified from *Warehouse worker* to *Senior Warehouse worker*. The recommended effective date of this action is May 9, 1998 or 30 days prior to the date the City received notice of the Step 3 Grievance. This recommendation is consistent with Section 20.5 of the Agreement between the City and the Joint Crafts Council.

Costing

If this report is implemented on the 1998 4th Quarter Ordinance, the maximum estimated cost of this action would be \$3,796,69 which includes current and retroactive costs. The ongoing annual cost of this action would be \$3,796,69. The calculations are based on the difference between the top step of the current salary range and that of the recommended salary range and includes statutory benefits (FICA, etc.). The actual amount payable to the affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: 09/09/98

Report No.: 98-2250

POSITION IDENTIFICATION

Department: City Light
Classification Title: Supervising Personnel Specialist
Ordinance Title: Personnel Specialist, Supervising
Position Number: 012169
Bargaining Unit: 030 Current Salary: \$22.08hr. - \$25.70hr.(Range 35.5A)

RECOMMENDED ACTION

Classification Title: General Government Manager 1
Ordinance Title: Manager 1, General Govt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary:\$21.33hr. - \$28.79hr. (Range -NA)
Remarks

INCUMBENT STATUS

Incumbent: Vacant
Current Standing: NA
Recommended Standing: Manager 1, General Govt
In recommended standing, incumbent status is: NA
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.

Recommended: Carla Coward *chc* Class/Comp Analyst
Approved: John Pearson *JP* Class/Comp Supervisor
Lidia Santiesteban *LS* Class/Comp Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request submitted by City Light. The Personnel Specialist Supervisor position was reviewed approximately one year ago with payroll and records supervisory responsibilities. Since that time, City Light's Human Resources Division has reorganized and the Personnel Manager position has been filled to manage the payroll, records, management reporting and personnel specialist work units. The Personnel Specialist Supervisor position has been transferred to manage the newly formed Learning, Education and Development section.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Manager or Strategic Advisor Program. The point factor analysis yielded 200 points in the Strategic Advisor point factor system and 343 points in the Manager point factor system. Manager 1 is the most appropriate allocation due to the description of primary work duties and the salary advantage it affords the position. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/120	Low/53	NA	NA	Low/43	Med/87	Low/40

Recommendation:

Based on the duties and responsibilities, we recommend that this position be reclassified as a General Government Manager 1, effective the date the MPDQ was signed, July 20, 1998.



Costing

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action would be a cost savings of \$778.81. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be a cost savings of \$1,557.61. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary pay zone and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: September 8, 1998 **Report No.:** 98-2408

POSITION IDENTIFICATION

Department: CITY LIGHT
Classification Title: ACCOUNTING TECHNICIAN I
Ordinance Title: ACCOUNTING TECHNICIAN I-BU
Position Number: 012529 (1997 RATES)
Bargaining Unit: 035 **Current Salary:** \$13.01--\$14.51 (Range: 20.5B)

RECOMMENDED ACTION

Classification Title: ACCOUNTING TECHNICIAN II
Ordinance Title: ACCOUNTING TECHNICIAN II-BU
Legislation Required: YES (1997 RATES)
Bargaining Unit: 035 **Recommended Salary:** \$14.00--\$15.66 (Range: 22.5B)
Remarks: The effective date for reclassification is July 16, 1998 (15 working days prior to the date the grievance was filed) in accordance with Article 6 of the Agreement between the City and IFPTE, Local 17

INCUMBENT STATUS

Incumbent:
Current Standing: ACCOUNTING TECHNICIAN I
Recommended Standing: ACCOUNTING TECHNICIAN II
In recommended standing, incumbent status is:
 Regular; Probationary; Temporary.
Authority: Personnel Rule Article 9 of the Agreement between the City and IFPTE, Local 17
 ~~2.3.100;~~ ~~2.3.200;~~ ~~2.3.300.~~
Remarks:

Recommended: 98Team2 *slr* Classification/Compensation Analyst(s)
Approved: John Pearson *JBP* Classification/Compensation Supervisor
Lidia Santiesteban *LS* Classification/Compensation Director
Norma McKinney *NM* Personnel Director



Source of Request and Position Identification:

This position was reviewed as a result of a Step 3 Grievance for work performed out of class filed by IFPTE, Local 17 on behalf of the incumbent.

Position No. 012529 is located in the Account Control Section of the Credit Office, Account Services Division of Seattle City Light. The primary functions of this work unit are [a] to process Accounts Receivable [b] verify and insure accuracy of the CIS billing system and [c] perform daily cash balancing.

Position History:

Detailed historical data of the position can be accessed via the Personnel Division's Records Unit.

Scope of Review:

This review was conducted by members of Class/Comp 98Team2, consisting of Gail Thompson and SharonLee Nicholson. The review of the subject position included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) submitted for this review;
- ◆ Class Spec for *Accounting Technician I*
- ◆ Class Spec for *Accounting Technician II*
- ◆ Telephone interview of Mary Meier, Manager of the Department's Credit Office

SharonLee Nicholson wrote the report

Summary of Work:

The primary responsibility of the position and the reason given for submitting the grievance is the pilot *Automatic Clearing House (ACH)* program providing an automatic bank payment program to City Light customers. About half of the position's work time is dedicated to the ACH pilot program.

City Light Department and Executive Services Department management developed policies and parameters for establishing the ACH pilot. Based on those parameters, this position is singularly responsible for preparing invitation letters to eligible customers, monitoring and completing arrangements for time-sensitive transactions

(e.g., the transfer of funds from the customers' accounts to the utility) and preparing weekly and monthly reports on the ACH program for department management. Since the ACH program is new, the incumbent was required to develop, implement (and revise as necessary) operating procedures to implement the pilot.

Operating this pilot requires frequent contact with banks throughout the Puget Sound region to establish the customers' ACH transaction documentation. The incumbent also must work closely with staff in the Finance Division of the Executive Services Department (ESD) to coordinate information and dates for establishing (or rejecting) a customer's automatic account payment transaction. Interactions with banks and ESD are time-sensitive and the incumbent prioritizes the position's overall work to accommodate time-critical tasks related to the pilot. In addition to managing the direct ACH project tasks, this position also develops and prepares weekly and monthly Excel reports on the program which are used by management to make policy-level changes and to launch the Citywide program.

Issues of particular sensitivity for this position include the evaluation of customer files to determine eligibility and to send invitation letters to eligible customers. This position also denies participation to customers who do not meet the minimum participation standards. Finally, according to the information provided by management, the position must collaborate across the ESD and City Light departments to manage customer account information when establishing a customer's account ACH and when identifying program rejects.

Aside from ACH-related activities, this position also is required to: [1] verify accuracy of daily cash applied to CIS; [2] post accounts receivable; and [3] post Project Share contributions.

Independent decisions made in the position include reporting and resolving out-of-balance cash batch runs; determining whether or not a customer qualifies for the ACH program; and making ACH operational procedure changes based on policy changes.

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.

Analysis:

According to a review of the class specs, both the *Accounting Technician I* and *Accounting Technician II* classes of work involve the maintenance of accounting records. However, the classes are distinguished from each other by several factors: [a] level of supervision required (*ATII* requires limited while *ATI* requires continual supervision), [b] the responsibility of an *ATII* for performing a full range of accounting records maintenance (e.g., for a function such as payroll or a program such as ACH). Another significant distinction of the *ATII* class is that the work involves assignments where the cost of correcting errors is costly and/or time consuming.



Generally, *Accounting Technician I* level positions are assigned work on a task-by-task basis with a lead worker or supervisor overseeing the work on a task-by-task basis. In comparison, *Accounting Technician II* level positions are assigned work on a functional or programmatic basis with contact between the *ATI* and the supervisor or lead worker limited to answering questions or resolving issues related to special problems encountered.

Prior to commencement of the *Automatic Clearing House (ACH)* project, the work of this position was well within the *Accounting Technician I* classification. However, when it assumed the ACH-related duties, this position commenced working at a higher level. ACH-related decisions made by the incumbent involve issues that, with incorrect decisions, could be very costly to correct. Additionally, given the new status of the program, errors committed by the incumbent could result in prohibiting the pilot from becoming a permanent citywide program due to its high visibility [involving interaction with banks, other departments and numerous customers]. The authority to arrange for automatic and direct payment from customers' personal bank accounts implies a high level of both knowledge and competence. This authority alone is sufficient to classify this position at the higher level. However, the complexity involved in administering a new program such as the *ACH* pilot also supports the higher classification.

Recommendation:

Therefore, based on the above analysis, we recommend the subject position be reclassified to *Accounting Technician II* with the ordinance title of *Accounting Technician II-BU*. The effective date of this action is July 16, 1998 (fifteen working days prior to the date the grievance was filed) in accordance with Article 6 of the Agreement between the City of Seattle and IFPTE, Local 17.

Costing

If this report is implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of this action would be \$2,798.84 which includes current and retroactive costs. The ongoing annual cost of this action would be \$2,798.84. The calculations are based on the difference between the top step of the current salary range and that of the recommended salary range and includes statutory benefits (FICA, etc.). The actual amount payable to the affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: November 2, 1998

Report No.: 98-2412

POSITION IDENTIFICATION

Department: City Light
Classification Title: Management Systems Analyst
Ordinance Title: Management Systems Analyst
Position Number: 019075
Bargaining Unit: 030
Rates in effect as of November 1, 1998
Current Salary: \$20.74 - 24.17 (Range: 33.0A)

RECOMMENDED ACTION

Classification Title: Senior Systems Analyst
Ordinance Title: Systems Analyst, Senior
Legislation Required: Yes
Bargaining Unit: 030 Recommended Salary: \$24.61- \$28.70 (Range: 37.5A)
Remarks: Reclassification Effective: May14, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: Management Systems Analyst
Recommended Standing: Systems Analyst, Senior
In recommended standing, incumbent status is:
 Regular Probationary Temporary
Authority: Personnel Rule
 2.3100 2.3.200 2.3.300

Recommended: Team 2 *chc* Classification Analyst(s)
Approved: John Pearson *JP* Classification Supervisor
Lidia Santiesteban *DES* Classification/Compensation Director
Norma McKinney *NM* Personnel Director



Position Identification And Source Of Request

Position #019075 is located in the Database Administration Unit of the Information Technology Division within the City Light Department. It is being reviewed as a result of a departmental request.

Background:

The Information Technology Unit provides accurate, reliable access to Oracle relational database management system (RDBMS) data throughout the Utility. According to the submitted PDQ, the Oracle database administrator resigned in May 1998 and as a result the work was redistributed to the subject position.

Scope of Review:

This review was conducted by Gail Thompson, a Classification Analyst assigned to Team 2. This review consisted of an analysis and evaluation of the following:

- ◆ the Position Description Questionnaire (PDQ) dated May 11, 1998;
- ◆ class specifications in the Management Systems Analyst and Systems Analyst class series;
- ◆ an informational interview with the incumbent;
- ◆ a telephone conversation with the position's manager;
- ◆ comparison to similar positions;
- ◆ review of the subject position's organization unit;
- ◆ position history records and related classification files.

Summary of Work

The essential purpose of this position is to administer Oracle databases.

Tasks include:

Database administration (100%)

- ✦ maintaining and recovering database contents;
- ✦ maintaining software, access and usage authorities for the RDBMS databases;
- ✦ creating, testing and scheduling database maintenance, backup, reorganization and condition reporting for all RDBMS subsystems;
- ✦ assisting application developers;
- ✦ monitoring application and system database performance.

NOTE: For a complete listing of the subject position's responsibilities, see the Position Description Questionnaire (PDQ) submitted for this review and included in the position file.



Class Concepts and Comparisons

Positions assigned to the Management Systems Analyst class are responsible for improving managerial effectiveness, including establishing the flow of information, determining how and to whom it will travel, and working with users and systems analysts to design an organizational system that achieves maximum efficiency from an operational perspective. In comparison, positions allocated to the Systems Analyst class perform technical functions within an automated program domain such as writing code and formulas, establishing network links through programmatic functions, etc.

The body of work assigned to the subject position most closely resembles that of the Systems Analyst class series. Positions within this class series diagnose and solve system problems within a specialty area using the techniques and methods of the specialty to determine the most appropriate methods and procedures for carrying out the assignment. This class series consists of five levels. The levels are distinguished from one another by their respective degrees of work difficulty and responsibility.

For this review the journey and senior levels were chosen. Positions allocated to the journey level provide technical support to ensure that the automated aspect of the "system" is functioning both optimally and systematically. Position incumbents diagnose and solve system problems within a specialty area. They also apply technical expertise and software-specific knowledge to maximize the overall efficiency through the development and use of automated systems.

In contrast, Senior Systems Analysts plan, develop, coordinate and analyze data processing systems to determine feasibility and practicality of requested services, and diagnose system failures to isolate sources of problems between equipment, system software and application programs. Incumbents at this level also serve as project leads, and are sought out as technical experts on issues and decisions involving interpretation and analysis of established choices with limited precedents.

Analysis:

The subject position was reviewed last in 1995 and allocated to the title of Management Systems Analyst. At the time of review, the position's responsibilities included: system administration (30%), database administration (30%), application support (30%), providing technical support (10%).

According to the PDQ, the subject position is currently the only Oracle database administrator in the division. It is responsible for monitoring and optimizing the performance of each database instance and related applications; installing software; creating database instances; planning and implementing physical database designs; participating in and assisting application teams with the logical database design; and managing all access to departmental Oracle data.



The PDQ makes a comparison of the subject position's body of work with that of several positions within the City (#016571, 021197, 024578, 021203 and 025605). According to the latest PDQs on file, these are senior level positions and they are responsible for:

Position #016571 (Diane Brady) maintaining UNIX database servers, Local Area Network (LAN) server and other servers within the department.

Position #021197 (Judy Dickerson) maintaining City Light's Seattle Financial Management System (SFMS).

Position #024578 (Craig Lukin) LAN administration.

Position #021203 (Paul DeAnguera) database administration.

Position #025605 (Gary Hott)

This position is assigned to a special project (Summit).

Review of the above senior level Systems Analyst positions revealed that they are all responsible for some form of database administration work. In comparing the subject position's body of work with that of the aforementioned positions and the journey and senior level Systems Analyst class specifications, I find that the appropriate classification is Senior Systems Analyst. The role of the subject position has evolved from one of support to lead database administration. As such, the duties are clearly within the class of Senior Systems Analyst.

Recommendation

It is therefore recommended that the subject position be reclassified to the title of **Senior Systems Analyst**. This action should become effective May 14, 1998, the date the PDQ was signed.

Costing

If implemented on the 1998 4th Quarter Ordinance, the maximum estimated cost of implementing this action would be \$18,374.98. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be \$11,024.99. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: October 29, 1998 **Report No.:** 98-2445

POSITION IDENTIFICATION
Department: CITY LIGHT
Classification Title: ENERGY CONSERVATION REPRESENTATIVE, SUPERVISING
Ordinance Title: ENRGY CONSERV REP, SUPVSNG
Position Number: 019127 (1997 RATES)
Bargaining Unit: 030 **Current Salary:** \$19.29--\$22.48 (Range: 32.0A)

RECOMMENDED ACTION
Classification Title: ASSISTANT ENERGY MANAGEMENT ANALYST
Ordinance Title: ENRGY MGMT ANLYST, ASST
Legislation Required: YES (1997 RATES)
Bargaining Unit: 030 **Recommended Salary:** \$17.99--\$20.94 (Range: N/A)
Remarks: See following pages for pertinent allocation information

INCUMBENT STATUS
Incumbent:
Current Standing: ENERGY CONSERVATION REPRESENTATIVE, SUPERVISING
Recommended Standing: ASSISTANT ENERGY MANAGEMENT ANALYST
In recommended standing, incumbent status is:
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: SharonLee Nicholson Classification/Compensation Analyst(s)
Approved: John Pearson Classification/Compensation Supervisor
Lidia Santiesteban Classification/Compensation Director
Norma McKinney Personnel Director



Source of Request and Position Identification:

This review was conducted at the request of the City Light Department due to changes in work and a workforce reduction in the Energy Management Services Division. This position served as a Supervising Energy Conservation Representative in the Residential Weatherization Program until that program was terminated.

Simultaneously, this position lost its subordinates. Currently, the position is expected to deliver conservation field services to residential and small commercial customers.

Position History:

Detailed historical data of the position can be obtained via the Personnel Division's Records Unit.

Scope of Review:

This review was conducted by members of Class/Comp 98Team2, consisting of Gail Thompson, Carla Coward and SharonLee Nicholson. The review of the subject position included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) submitted for this review;
- ◆ Class Spec for *Supervising Energy Conservation Representative* (current title)
- ◆ Class Spec for *Assistant Energy Management Analyst* (requested title)
- ◆ Class Spec for *Energy Management Analyst*
- ◆ Meeting with EMSD management staff

Summary of Work:

The essential function of this position is to oversee the Small Commercial Rebate Program, coordinating the daily operations and conducting field verifications. The focus of the field verifications consists of lighting installations performed by lighting contractors through the Small Commercial Rebate Program. Other tasks of the position include:

- ◆ Helping develop marketing plans and outreach activities for small commercial customers;
- ◆ Creating program tracking systems to identify contractor performance, customer participation and energy savings;
- ◆ Troubleshooting customer complaints;
- ◆ Coordinating small commercial projects with department staff in other divisions and acting as contact person for the Small Commercial Rebate Program with other City Departments.



Analysis:

This position is no longer properly classified due to the elimination of its supervisory responsibilities with termination of the Residential Weatherization Program. According to the specification for this position's current class, *Supervising Energy Conservation Representative*, a position in that class "...is a first line supervisor in the Energy Conservation series..." The primary task is to "...Supervise, direct, coordinate and review the work of a group of subordinate Energy Conservation Representatives..."

The class requested by the Department for the subject position, *Assistant Energy Management Analyst*, is the entry level in the *Energy Management Analyst* series. Positions in this class conduct energy audits and prepare energy analysis reports of commercial or industrial facilities. Their work is performed under continuing supervision. According to the PDQ submitted for this review, the incumbent in Position No. 019127 is conducting such audits in the context of coordinating the Small Commercial Rebate Program.

The journey level of the series (*Energy Management Analyst*) is differentiated from the assistant level by the scope of duties and complexity of facilities audited. For example, a journey level position typically conducts audits in large, complex industrial facilities. On the other hand, the work of the subject position focuses exclusively on small businesses. Therefore, the journey level in the *Energy Management Analyst* series is not appropriate for this work.

Recommendation:

Based on our review of material submitted for this review, we recommend that Position No. 019127 be reallocated to *Assistant Energy Management Analyst*. The recommended effective date of this action is September 21, 1998, the date this position was submitted for review. Based on Personnel Rule 3.3.400.C, we recommend that the incumbent in Position No. 019127 be incumbency rated.

Costing

If this report is implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost **reduction** resulting from this action would be \$5,192.05, which includes current and retroactive costs. The ongoing annual cost **reduction** from this action would be \$5192.05. The calculations are based on the difference between the top step of the current salary range and that of the recommended salary range and includes statutory benefits (FICA, etc.). The actual amount payable to the affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: 10/22/98

Report No.: 98-2446

POSITION IDENTIFICATION

Department: City Light
Classification Title: Finance Analyst
Ordinance Title: Finance Analyst
Position Number: 017593
Bargaining Unit: 030 Current Salary: \$20.04 hr. - \$23.35 hr. (rg 33.0A)

RECOMMENDED ACTION

Classification Title: Energy Planning Analyst
Ordinance Title: Energy Planning Analyst
Legislation Required: Yes
Bargaining Unit: 030 Recommended Salary: \$20.04 hr. - \$23.35 hr. (rg 33.0A)
Remarks Effective Date: 9/15/98

INCUMBENT STATUS

Incumbent:
Current Standing: Finance Analyst
Recommended Standing: Energy Planning Analyst
In recommended standing, incumbent status is:
[X] Regular; [] Probationary; [] Temporary.
Authority: Personnel Rule
[X] 2.3.100; [] 2.3.200; [] 2.3.300.

Recommended: Carla H. Coward *che* Class/Comp Analyst
Approved: John Pearson Class/Comp Supervisor
Lidia Santiesteban *LS* Class/Comp Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST / POSITION IDENTIFICATION

This position was reviewed as a result of a request from the Energy Management Services Division of Seattle City Light. The department believes that the current job title is not appropriate for the assigned job duties, which are no longer financial in nature. The primary work of this position is planning and development of community conservation programs.

SCOPE OF REVIEW

Review of this position included analysis of the following:

- Position Description Questionnaire (PDQ) submitted for the purposes of this review;
- Class Specifications #2003504 and 2201004;
- Organizational Chart;
- and other records available internally.

STATEMENT OF DUTIES

The essential purpose of this position is to plan and implement new and revised energy conservation programs for residential and small commercial customers, including program features, materials, policies and procedures, by researching and coordinating with technical field staff, other utility staff and consultants.

NOTE: For a more complete listing of this position's responsibilities, see the Position Description Questionnaire (PDQ), dated September 15, 1998, submitted for the purposes of this review.

ANALYSIS

The incumbents in Finance Analyst positions coordinate and participate in the preparation and defense of a division or department budget, or they may participate in the financial management of a multi-department grant or capital program. They conduct research and analysis of division/department financial issues. They also assist in preparing financial reports, expenditure and status reports, and provide fiscal and budgetary controls over capital projects, grants and/or operating budgets.

The duties of incumbents in Energy Planning Analyst positions include performing research, analysis and design activities; the implementation and evaluation of energy planning programs; development of policies and the resolving of related issues in order to maximize energy conservation.

The incumbent in this position continues to coordinate the development of the sections annual budget and monitor and maintain budget records. But this is only 25% of the job. Planning new conservation programs or services and changes to existing programs or services and leading the Built Smart Program planning and implementation, which is a program to encourage multi-resource efficiency in new construction of multifamily buildings, along with other related work is 75% of the job.



RECOMMENDATION

Based on the duties and responsibilities, we recommend that this position be reclassified as an Energy Planning Analyst, effective September 15, 1998 the date of the PDQ was signed.

Costing

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action would be zero. Using rates in effect as of the writing of this report, this figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost through the end of 1999 for this action would be zero. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: November 3, 1998 Report No.: 98-2448

POSITION IDENTIFICATION
Department: City Light
Classification Title: Research & Evaluation Assistant
Ordinance Title: Research & Evaluation Assistant - BU
Position Number: 019296 *Rates in effect as of November 1, 1998*
Bargaining Unit: 004 Current Salary: \$16.84 - \$19.58 (Range: 27.5A)

RECOMMENDED ACTION
Classification Title: Administrative Staff Assistant
Ordinance Title: Administrative Staff Assistant
Legislation Required: Yes
Bargaining Unit: 030 Recommended Salary: \$18.14 - \$21.16 (Range: 29.5A)
Remarks: Reclassification Effective: July 28, 1998
Remarks:

INCUMBENT STATUS
Incumbent:
Current Standing: Research & Evaluation Assistant
Recommended Standing: Administrative Staff Assistant
In recommended standing, incumbent status is:
 Regular Probationary Temporary
Authority: Personnel Rule
 2.3100 2.3.200 2.3.300

Recommended: Team 2 _____ Classification Analyst(s)
Approved: John Pearson _____ Classification Supervisor
_____ Classification/Compensation Director
Norma McKinney _____ Personnel Director



Position Identification and Source of Request

Position #019296 is located in the Lighting Design Lab within the department of City Light. It is being reviewed as a result of a departmental request.

Background:

According to the PDQ, the work of the subject position has evolved. This evolution occurred due to the more sophisticated technical requirement of the Lighting Design Lab clients. It is management's belief, that the work is no longer reflective of the Research and Evaluation Assistant class.

Scope of Review:

This review was conducted by Gail Thompson, a Classification Analyst assigned to Team 2. This review consisted of an analysis and evaluation of the following:

- » the Position Description Questionnaire (PDQ) dated July 28, 1998;
- » class specifications in the Research & Evaluation Assistant and Executive Support class series;
- » tour of the Lighting Design Lab;
- » informational interviews with the Project Manager and the subject incumbent;
- » review of the subject position's organization chart;
- » position history records and related classification files.

Summary of Work

The subject position is essentially responsible for maintaining the Lighting Design Lab's library, providing technical and systems support, producing publications specific to the Lighting Design Lab.

NOTE: For a complete listing of the subject position's responsibilities, see the Position Description Questionnaire (PDQ) submitted for this review and included in the position file.

To appropriately classify the subject position, the assigned body of work was compared with that characterized within the Research and Evaluation Assistant and the Executive Support class series.

Class Concepts

Research and Evaluation Assistant

Positions perform moderately difficult research and statistical or program evaluation analysis. Work involves analyzing and evaluating data, and preparing analytical and narrative reports or reports in a spreadsheet format that provide information on program status. This is a single level class.



Executive Support

Positions perform a mixture of administrative duties, usually performed by other administrative fields, in which no one specialty field constitutes a majority of the duties. This series consists of four levels.

Analysis

The above review revealed that the subject position is no longer performing work typically assigned to Research and Evaluation Assistants (*analyzing and evaluating data, and preparing analytical and narrative reports*), but rather that generally assigned to positions within the Executive Support class series (*performing a mixture of administrative duties*).

Having determined that the Executive Support class series is the most relevant family of titles, what remains to be determined is the appropriate classification level. The assistant (*Administrative Staff Assistant*) and the journey (*Administrative Staff Analyst*) levels were chosen for this review. These levels are distinguished by the size and diversity of the assigned program and by the respective degrees of work difficulty and responsibility required.

Positions assigned to the assistant level act as staff assistants to a small section, unit or to departmental management. Positions incumbents are expected to use judgment to make decisions about day-to-day office, budgetary, personnel problems and/or activities. They are also expected to interpret and apply policies and procedures to day-to-day situations. In contrast, journey level positions research and analyze a variety of operational or administrative issues and/or problems; assist in personnel matters; serve as liaison with other sections and divisions; and monitor contracts. Employees also provide general administrative and analytical support to a small department or to a large unit of a department

Conclusion

This review revealed:

- a) that the subject position is assigned to a small section within the City Light Department. The Lighting Design Lab staffs three full time/permanent positions.
- b) that the body of work assigned to the subject position consists of a mixture of administrative functions (*maintaining the library, providing technical and system support, producing graphic publications*), none of which constitutes a majority of the assigned duties.

While we have classifications which cover each of the aforementioned functions when they occur alone, the Administrative Staff Assistant class tends to combine two or more of these functions at the same time. I recognize that the subject position does not perform the entire range of possible administrative duties and responsibilities within this class, it does however perform a substantial number of the activities.



Recommendation:

It is therefore recommend that the subject position be reclassified to the title of Administrative Staff Assistant. This action should become effective July 28, 1998, the date the PDQ was signed.

Costing

If implemented on the 1998 4th Quarter Ordinance, the maximum estimated cost of implementing this action would be \$5,768.04. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be \$3,845.36. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: 11/03/98 Report No.: 98-2534

POSITION IDENTIFICATION

Department: Seattle City Light
Classification Title: Principal Systems Analyst
Ordinance Title: Sysys Anlyst, Prin
Position Number: 022796
Bargaining Unit: 030 Current Salary: \$26.20hr. - \$30.39hr (Range - 40.0A)

RECOMMENDED ACTION

Classification Title: Information Technology Manager 2
Ordinance Title: Manager 2, Info Technol
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$ 25.20hr. - \$34.02hr. (No Range)
Remarks

INCUMBENT STATUS

Incumbent:
Current Standing: Sysys Anlyst, Prin
Recommended Standing: Manager 2, Info Technol
In recommended standing, incumbent status is:
[X] Regular; [] Probationary; [] Temporary.
Authority: Personnel Rule
[X] 2.3.100; [] 2.3.200; [] 2.3.300.

Recommended: Carla Coward *CC* Class/Comp Analyst
Approved: John Pearson *JP* Class/Comp Supervisor
Norma McKinney *NM* Class/Comp Director
Personnel Director *DEB*



SOURCE OF REQUEST

This position was reviewed as a result of a request submitted by Seattle City Light, Information Technology Division. City Light's Geographic Information Systems (GIS) program began in August, 1990 with the creation of the Distribution Automation Mapping System (DAMS). At that time, a Principal Systems Analyst position was created to oversee this body of work. The Information Technology Director states that the overall body of work that this position manages has grown significantly in the number of GIS applications and end users served; grown in technical complexity; and grown in criticality to the Utility's operations.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Managers or Strategic Advisor Program. The point factor analysis yielded 572 points in the Manager point factor system. Manager 2 is the most appropriate allocation due to the description of primary work duties. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/120	Low/53	Hi/140	Med/93	Low/43	Low/43	Med/80

Recommendation:

Based on the duties and responsibilities, we recommend that this position be allocated as an Information Technology Manager 2, effective, October 6, 1998, the date the MPDQ was signed.

Costing

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost savings of implementing this action would be \$474.59. Using rates in effect as of November 1, 1998, this figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost savings through the end of 1999 for this action would be \$1,898.34. The calculations are based on the difference between the top step of the current salary and the midpoint of the recommended salary pay zone and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: November 25, 1998

Report No.: 98-2581

POSITION IDENTIFICATION

Department: CITY LIGHT
Classification Title: SENIOR ENERGY MANAGEMENT ANALYST SUPERVISOR
Ordinance Title: ENERGY MANAGEMENT ANALYST SUPERVISOR, SR
Position Number: 018485 Salary rates in effect as of November 1, 1998
Bargaining Unit: 030 Current Salary: \$25.88--\$30.04(Range: N/A)

RECOMMENDED ACTION

Classification Title: ENERGY MANAGEMENT ANALYST SUPERVISOR
Ordinance Title: ENERGY MANAGEMENT ANALYST SUPERVISOR
Legislation Required: YES Salary rates in effect as of November 1, 1998
Bargaining Unit: 030 Recommended Salary: \$23.04--\$26.88 (Range: N/A)
Remarks:

INCUMBENT STATUS

Incumbent:
Current Standing: SENIOR ENERGY MANAGEMENT ANALYST SUPERVISOR
Recommended Standing: ENERGY MANAGEMENT ANALYST SUPERVISOR
In recommended standing, incumbent status is:
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: 98Team2 *slr* Classification/Compensation Analyst(s)
Approved: John Pearson *JP* Classification/Compensation Supervisor
CB Classification/Compensation Director
Norma McKinney *NM* Personnel Director



Source of Request and Position Identification:

This position was reviewed at the department's request and in connection with a review of a peer position in the same work unit. Position No. 018485 resides in the Commercial and Industrial Energy Management Services Section at Seattle City Light. The primary function of this work unit is to acquire conservation savings from commercial, governmental, institutional and industrial customers.

Position History:

The position was created in the 1984 budget. Detailed historical data of the position is available in the Personnel Division's Records Unit.

Scope of Review:

SharonLee Nicholson, a member of Class/Comp 98Team2, conducted this review. The review of the subject position included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) submitted for the review;
- ◆ Supplemental written information submitted by City Light management in connection with the PDQ;
- ◆ Class spec for *Energy Management Analyst Supervisor* (Schematic #7005007);
- ◆ Class spec for *Senior Energy Management Analyst Supervisor* (Schematic #7005009);
- ◆ Documentation for Position #020426, *Energy Management Analyst Supervisor* in the same work unit
- ◆ Management interviews and job audits of Position #020426 and #018485

Summary of Work:

The essential purpose of this position is to supervise a group of Energy Management Analysts (base and senior level) who work in two teams (commercial and industrial). The position also serves on a three-member EMA Supervisor management team that develops and improves program procedures, establishes section goals and performance measures, develops new service initiatives and enhances the productive capability of the section.

According to the PDQ, the position spends about 60% of its time in program and contract coordination; that is: plan, supervise and assist with implementation of energy management programs for commercial and industrial customers. The work group reporting to the position is configured in two teams with each responsible for a sector (commercial or industrial).



The absence of distinct supervisory activities is consistent with a team-oriented organization such as the Energy Management Services Section. That is, teams of professional workers often perform with minimal supervision; supervisory activities are primarily administrative functions such as signing time sheets.

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.

Analysis:

Management comments regarding the work of this and its peer position (#018485 and #020426) are parallel. According to information provided, both positions participate on the management team that work with the Section Manager in developing new energy conservation programs as well as coordinating and directing the refinement and enhancement of existing programs. Neither position has a subordinate supervisor; rather, the section is organized in teams, consistent with the City's general move to flatter organizations with fewer layers of managers or supervisors. Comparing Position #018485 to the class specifications reveals that the position is currently overclassified for the following reasons:

1. Supervisory responsibilities: The class spec for *Senior Energy Management Analyst Supervisor* states that "Through supervisors, manages the work of Energy Management Analysts . . ." This position is currently not responsible for subordinate supervisors.
2. Technical Review of Complex Projects: The *Senior Energy Management Analyst Supervisor* class spec states that positions at this level are "...responsible for final technical review of complex and costly projects..." According to Page 4 of the PDQ reviewed here, this position "shares in the responsibility to direct the development, and refinement of section's energy analysis procedures to assure technical accuracy..." We should note that shared responsibility for elements of accountability is consistent with the team-based organizational approach as well as with the class spec for the *Energy Management Analyst Supervisor*. According to the class summary, EMA Supervisors "...lead a project team... in facilitating participation of building owners and developers in City Light's energy conservation programs."

We agree with department management that the work of this position is parallel with the work of Position #020426: (a) both positions are performing at the *EMA Supervisor*, not the *Senior EMA Supervisor* level; (b) both positions supervise senior and journey level EMAs; and (c) neither position has subordinate supervisors.

Recommendation:

Based on the above analysis, we recommend that the subject position be reclassified to *Energy Management Supervisor*. The effective date of this recommendation is February 19, 1998, the date of the PDQ submitted for this review.



Costing

If this report is implemented on the 1998 4th Quarter Ordinance, the maximum estimated **savings** related to this action would be \$14,099.66, which includes current and retroactive savings. The ongoing annual savings that is related to this action would be \$7,690.72. The calculations are based on the difference between the top step of the current salary range and that of the recommended salary range and include statutory benefits (FICA, etc.). The actual amount payable to the affected employee will vary.

There is no cost associated with this recommendation.





CLASSIFICATION DETERMINATION REPORT

Date: December 11, 1998 Report No.: 98-2582

POSITION IDENTIFICATION

Department: CITY LIGHT
Classification Title: Assistant Civil Engineer
Ordinance Title: Civil Engineer, Assistant II
Position Number: 012851
Bargaining Unit: 034 Current Salary: \$19.77 -- \$23.04 (Range: n/a)

RECOMMENDED ACTION

Classification Title: ASSOCIATE CIVIL ENGINEER
Ordinance Title: CIVIL ENGINEER, ASSOCIATE
Legislation Required: Yes
Bargaining Unit: 034 Recommended Salary: \$23.04 -- \$26.88 (Range: n/a)
Remarks: Attached is a copy of the Abbreviated PDQ for this position as prepared by department management which describes the new body of work to be performed by this position.

INCUMBENT STATUS

Incumbent: VACANT
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is:
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: SharonLee Nicholson Classification/Compensation Analyst(s)
Approved: John Pearson Classification/Compensation Supervisor
Dean Barnes Employee Services Director
Norma McKinney Personnel Director



SEP 17 1998



CITY OF SEATTLE PERSONNEL DEPARTMENT
Classification/Compensation Unit

**ABBREVIATED
POSITION DESCRIPTION QUESTIONNAIRE**

(This form is to be used for vacant positions and/or requests resulting from reorganizations)

DEPARTMENT/DIVISION: Light/Generation Engineering Division

POSITION NUMBER: 012861

DATE REQUESTED: September 8, 1998 EFFECTIVE DATE: October 1998

CLASSIFICATION REQUESTED: Civil Engineer, Associate

POSITION PURPOSE: Create a position for a lead design engineer who can serve as project engineer, design engineer, and working lead person to subordinate staff in the planning, design and construction of O&M and CIP projects.

POSITION SUMMARY: *Use the following space to summarize the essential duties and responsibilities assigned to the position. Briefly describe the work using action words.*

Duties and Responsibilities Statements	% of Time
1. Prepares preliminary and final designs, engineering reports, cost estimates, specifications; and performs construction consultations for Civil, Structural, and related projects dealing mainly with City Light's Generation facilities.	30
2. Serves as project engineer/coordinator on projects involving several civil design specialties such as generation plant facilities, water or sewer systems, miscellaneous structures, roadways, environmental improvements, or other related projects	20
3. Prepares and/or reviews a variety of reports, correspondence and official documents.	10
4. Coordinates and cooperates with other agencies, departments, branches and divisions involved in or affected by projects.	10
5. Mentors and trains less experienced professional civil engineers in developing the skill and knowledge base of the Generation Civil Engineering Group.	10
6. Assists the Supervisor in the budget process and planning and monitoring of the group's work load.	10
7. Participates in developing the technical scope of work, interview and selection, and review of the work performed by outside consultants.	5



8. Performs other related duties of a comparable level/type as assigned.

5

POSITION ALLOCATION CRITERIA:

Duty No. 1 — A primary secondary duty, is described in the class specification as:

Positions in this level class require knowledge of the principles, practices and procedures of civil and construction engineering, including the methods, materials, equipment and techniques used in civil engineering, construction and inspection; and extensive knowledge and ability to perform civil engineering design. This class may lead or supervise professionals and technicians or serve as a technical expert in a civil engineering specialty area.

Duty No. 2 — A primary secondary duty, is described in the class specification as:

Positions in this class may serve as a project engineer on technically complex, visible and/or high priority projects or programs. Most positions require the ability to coordinate the efforts of a multi-discipline, multi-agency project team to complete a defined assignment or CIP.

Duty No. 3 — A primary secondary duty, is described in the class specification as:

Prepares a variety of reports, correspondence and official documents as required in the course of project coordination and development.

Duty No. 4 — A primary secondary duty, is described in the class specification as:

Coordinates activities of a design team in the preparation of preliminary and long range plans, design plans, specifications, schedules, estimates, budgets, permit applications and agreements.

Duty No. 5 — A primary secondary duty, is described in the class specification as:

Attends to the career needs of other less experienced personnel in the group, including arranging for appropriate training, as well as providing guidance for work underway on an ongoing basis.

Duty No. 6 — A primary secondary duty, is described in the class specification as:

Prepares budgets, workload forecasts, project variance reports, and progress reports. Coordinates activities of a design team in the preparation of preliminary and long range plans, schedules, estimates, budgets, detail final construction plans, specifications, and agreements.



Duty No. 7 — A primary secondary duty, is described in the class specification as:

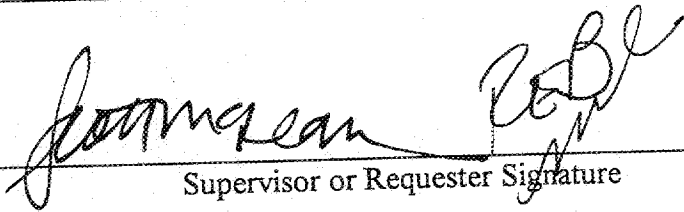
Serves as the technical expert in an engineering specialty area. Monitors the work of consultants, prepares and administers consultant and construction contracts, monitors contract progress, and reviews invoices for approval.

Duty No. 8 — A primary secondary duty, is described in the class specification as:

Performs other related duties whose nature cannot be foreseen due to the wide variety of needs that arise in the operation of a large municipal utility.

REASON FOR THE REQUESTED CHANGE:

The Generation Civil Engineering Group requires an increased level of technical expertise in order to provide the knowledge and skills of a lead designer capable of performing the complex civil engineering design work, guiding and mentoring subordinate staff, and coordinating and reviewing work products from consultants. With the existing position structure, there is a skills/career "bottleneck" in the Group at the Associate CE level: there are 2 Senior CE's, 1 Associate CE, and 3 Assistant CE's. The result is an oversupply of "entry" level (Assistant CE) positions, and an insufficient number of "journey-level" (Associate CE) positions. The reclassification of an Assistant CE position to Associate CE will provide a better balance of skills and an improved ability to meet the production needs of the SCL Generation Branch, and at the same time provide an open career path within the Group.



Supervisor or Requester Signature

9/8/98

Date



Department Head Signature

9/14/98

Date



For Personnel Use Only

POSITION NUMBER:

012951

TITLE:

Associate Civil Engineer

APPROVED AS REQUESTED:



Yes

No

OTHER RECOMMENDED ACTION:

S L Nicholson

Personnel Analyst Signature

12/11/98

Date

ph/son

Personnel Analyst Supervisor Signature

12/17/98

Date





CLASSIFICATION DETERMINATION REPORT

Date: July 30, 1998 Report No.: 98-1626A

POSITION IDENTIFICATION

Department: Construction and Land Use
Classification Title: Senior Finance Analyst
Ordinance Title: Senior Finance Analyst
Position Number: 017191
Bargaining Unit: 030 Current Salary: \$22.08-\$25.70 (Range: 35.5A)

RECOMMENDED ACTION

Classification Title: Senior Management Systems Analyst
Ordinance Title: Senior Management Systems Analyst
Legislation Required: Yes
Bargaining Unit: 030 Recommended Salary: \$23.78 - \$27.73 (Range: 37.5A)
Remarks: This report (see addendum) is in response to a reconsideration, and supersedes Report #98-1626.

INCUMBENT STATUS

Incumbent:
Current Standing: Senior Finance Analyst
Recommended Standing: Senior Management Systems Analyst
In recommended standing, incumbent status is:
 Regular; Probationary; Temporary (audit required).
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks: Reallocation, effective 11/9/97.

Recommended: Team 1 *ijp* *shk* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
Lidia Santiesteban *LS* Classification/Compensation Director
Norma McKinney *NM* Personnel Director



Source of Request and Position Identification:

This position was reviewed as a result of a departmental request. Position # 017191 is located in the Finance and Administrative Services Division. This work unit is responsible for providing general management, accounting, human resources and information systems services to facilitate the operation and management of the department.

Position History:

Detailed historical data of the position can be accessed via the Personnel Division's Records Unit.

Scope of Review:

This review was conducted by Irene Ogunyemi, a Class/Comp Analyst assigned to Team A. The review of the subject position included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) dated 4/1/98, and submitted for this review;
- ◆ Informational interview with the subject position incumbent (4/27/98);
- ◆ Team A's review/analysis of subject position information;
- ◆ Review and comparison to class specifications in the Finance Analyst and Management Analyst class series;
- ◆ Comparison to similar positions;
- ◆ Review of the organizational charts affecting the subject position;
- ◆ Position history records and related classification files.

Summary of Work:

The essential purpose of this position is to lead the work of a team of management systems analysts stationed in the operating units of the department; conduct independent research and analysis of complex department financial issues; and to act as primary liaison with Office of Management and Planning (OMP) and Council Staff for budget issues.

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.

Analysis:

During 1996, Department of Construction and Land Use (DCLU), was the subject of a program and funding study which recommended a significant change in the financial and budget structure of the organization. One result of the study was a mandate to move the budget and financial structure of the department to a programmatic structure. To support the programmatic structure, the budget and finance team in the Finance and Administrative Services division was decentralized to the operating units of the



department, and given expanded responsibilities for management support and analysis. The impact of the above structure changed the position's work from being part of a team to being the sole focal point of the department. The intent is to move the budget and financial structure of the department to a programmatic structure, and to be the primary liaison between DCLU and OMP, and between budget and accounting. The department believes the level, scope of duties and responsibilities of this position has changed significantly, thus requests for the position to be reclassified to the title of Senior Management Systems Analyst.

To appropriately classify the subject position, its body of work was reviewed and compared to the class specifications within the Finance Analyst (FA) and Management Systems Analyst (MSA) class series.

MSAs can be characterized as providing advice and service to management on specific operational and administrative processing and reporting systems by analyzing data gathered, developing information and considering all available solutions and alternatives. They are responsible for establishing the flow of information, determining how and to whom it will travel, and interfacing with users and Systems Analysts to design an organizational system that achieves maximum efficiency from an operational perspective. According to the submitted PDQ, 30% of the subject position's time is spent doing this body of work for the department. Because this body of work is not the focus of this position, the titles in this series are not appropriate for the subject position.

Note: It is appreciated that this position is being asked to redesign the financial system for the department. If this duty should, in the future, comprise more than 50% of the workload of this position, the position could be paid out of class as a Sr. Management Systems Analyst. This title is not appropriate as a permanent title because once the new system is in place (although it may need subsequent enhancements and maintenance), the majority of the position's duties will again be finance/budget related responsibilities, making the title inappropriate for the long term.

The Finance Analyst class series on the other hand, describes positions that forecast, prepare, and monitor operating budgets for capital projects, grants, and funded programs to assist in budget preparation, control and financial policy implementation for a division/department. As described in the submitted PDQ, 70% of the subject position's time is spent doing this body of work for the department. Based upon the above revelation, it was determined that the preponderance of this position's duties and responsibilities are best reflected in the Finance Analyst class series.

Position # 017191 is budgeted as a Management Systems Analyst, and being filled in-lieu-of as a Finance Analyst. Since the review revealed that the position's duties and responsibilities fall within the parameters of the Finance Analyst class series, what needs to be determined is its level. There are four levels within the Finance Analyst class series. They are distinguished from one another by their respective degrees of expertise in the areas of financial analysis, financial monitoring and reporting; expertise



As outlined in the submitted PDQ, the subject position does the following: (1) has the lead responsibility (leading a team of management systems analysts stationed in the operating units of the department) for department-wide coordination in the preparation and defense of the department's budget; (2) conducts independent research and analysis of complex department financial issues; and assists staff in operating units to develop approaches to fee analysis of DCLU's myriad of fees; and (3) participates in financial policy development and the development of training programs.

This review found that the subject position's level of work is beyond the scope and responsibilities of the Finance Analyst class, (which is the journey level in the series) because of its lead responsibility in the development, preparation, defense and monitoring of the department's operating budgets and financial management. But, it is not at the Supervisory level of work because it does not have full supervisory authority over other classes within the Finance Analyst series, nor exercise management authority over them. This analysis and comparison revealed that the class spec for the Senior Finance Analyst better describes the body of work of the subject position.

Recommendation:

Therefore, based on the above analysis, it is recommended that the subject position be reallocated to the title of Senior Finance Analyst, effective 4/1/98, the date position incumbent signed the PDQ.

Costing

If implemented on the 1998 Second Quarter Ordinance, the maximum estimated cost of implementing this action would be **\$3,336.30**. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be **\$5,719.37**. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.

ADDENDUM to Report #98-1626 (Reconsideration Assignment Tracking #98-2248)

The Reconsideration Hearing was held on July 29, 1998, and attended by the Finance and Administration Division Director Judith Noble representing DCLU management; the Reconsideration Board (Class/Comp Director Lidia Santiesteban, Class/Comp Supervisor Edie Jorgensen, and Class/Comp Senior Analyst Curt Funk); and Class/Comp Analyst Irene Ogunyemi representing Team 1. Management explained that the position's duties and responsibilities were not adequately communicated in the submitted PDQ nor in the informational interview with the incumbent. Therefore, they requested the Reconsideration Hearing to properly and clearly articulate the scope and complexity of the position's duties and responsibilities.

DCLU management explained that, at the time the position incumbent was hired, the department was under a mandate to move its budget and financial structure from divisional budgeting to a programmatic structure. To achieve the utmost success in this venture, the position incumbent was instructed to focus 100% on this portion of the



position's duties (thus putting other vital aspects of the position on hold). The subject position leads a team of four Senior Management Systems Analysts in this and other departmental ventures.

In addition to redesigning the financial system for the department, the subject position is expected to work with business managers in the department. This duty entails inquiring on the needs of the business managers and assessing, diagnosing, proposing, charting, and planning the systems to meet their needs. The position is also expected to maintain the information technology for DCLU; designing the electronic work flow that provides the documentation for the divisions as well as departmental management regarding contracting and purchasing; providing the decision support in designing the management reporting tool, and the determination of coding for the rigorous departmental timekeeping, budgeting and regulatory fees systems. It is also expected to work with the business, accounting, and budgeting structure and ensure that it matches the regulatory structure; and to create a system that is consistent with the reporting structure. This position is the primary lead for the department-wide performance measure project.

Since management clarified that this position serves as a lead over system design and development, and oversees implementation of projects involving considerable scope, complexity and long-term commitments, the Reconsideration Board determined that the body of work meets the intent of the class specification for Senior Management Systems Analyst. Therefore, the Board recommends that the subject position should now be reallocated to the title of Senior Management Systems Analyst effective November 9, 1997, the date the new duties were assumed by the position.

Costing

Based on salaries in effect as of the writing of the addendum, if implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action would be **\$12,436.58**. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be **\$10,659.92**. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: September 2, 1998 **Report No.:** 98-2418

POSITION IDENTIFICATION
Department: Construction & Land Use
Classification Title: Accounting Technician II
Ordinance Title: Accounting Technician II
Position Number: 014455
Bargaining Unit: 030 **Current Salary:** \$14.00--\$15.66 (Range: 22.5B)

RECOMMENDED ACTION
Classification Title: Assistant Personnel Specialist
Ordinance Title: Personnel Specialist, Assistant
Legislation Required: Yes
Bargaining Unit: 030 **Recommended Salary:** \$14.77--\$17.22 (Range: 25.0A)
Remarks: Attached is a copy of the Abbreviated PDQ for this position as prepared by department management which describes the new body of work to be performed by this position.

INCUMBENT STATUS
Incumbent: VACANT
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is:
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: 98Team2 *[Signature]* Classification/Compensation Analyst(s)
Approved: John Pearson *[Signature]* Classification/Compensation Supervisor
Lidia Santiesteban *[Signature]* Classification/Compensation Director
Norma McKinney *[Signature]* Personnel Director



City of Seattle
Personnel

**ABBREVIATED
POSITION DESCRIPTION QUESTIONNAIRE**
(This form is to be used for vacant or new positions only)

DEPARTMENT/DIVISION: Construction and Land Use

POSITION NUMBER: 014455

DATE REQUESTED: August 25, 1998

EFFECTIVE DATE:

CLASSIFICATION REQUESTED: Assistant Personnel Specialist

POSITION PURPOSE: Provides automated human resource and records management for payroll and benefits transaction processing and provides management reports to support human resource operations such as employee orientations, sick leave review, corrective action and performance management, return to work accommodations, etc. Acts as the caretaker and resource within the human resource unit for policies, contractual and ordinance provisions.

POSITION SUMMARY:

Use the following space to summarize the essential duties and responsibilities assigned to the position. Briefly describe the work using action words.

Duties and Responsibilities Statements	% of Time
<p>1. Conducts research, provides specialized support to the Personnel Unit, provides management reports to support human resource operations within the department and to resolve pay and benefit discrepancies. This information is maintained in a complicated set of automated information and confidential manual filing systems. The interpretation of the information and the reports are provided in such a ways as to evaluate policy and practices and to assist management and professional staff to make a variety of decisions regarding sick leave review, corrective action, performance management, return to work accommodations, and etc.</p> <ul style="list-style-type: none">• Research employee information and compile the information or prepare reports in such as way as to assist with management decisions related to human resource policies and practices.• Monitor employee actions for patterns that may need to be referred to the supervisor for correction or that need additional attention (sick leave use, incorrect pay or leave use, incorrect balance reports) through policy or system interpretations or modifications.	45 %



- Research and problem-solve perceived or real discrepancies in pay, benefits coverage and health care provider payments.
 - Research and compile data for purposes of correcting employee records such as making retroactive salary payments that have to take into account step placements and promotion rules.
2. This position must be proficient in understanding each employee's employment conditions as they are governed by represented and non-represented status, FLSA status, length of service and etc, to respond to employee's inquiries regarding compensation, status, standing and etc. Act as the human resource unit technical expert for the various policies affecting staff employment by maintaining and updating policy references and resources, and briefing human resources unit staff about changes. Setup employees in the automated labor collection system to properly provide for each individual staff member's employment within the department. 20 %
3. Process, audit and review bi-weekly reporting of automated time entered by employees prior to authorizing payroll batches to be uploaded to the City's payroll system for processing, proper recording of expenditures and distribution of pay warrants. 20 %
- Coordinates and interfaces between the department's labor collection system and the City's automated human resource system, payroll and financial management systems as they affect different aspects of employees records and control different functions such as financial management and creating pay warrants; and be able to work effectively in this automated system environment to enable the edits and controls of each of these automated systems to invoke the right conditions of employment for each employee.
4. Coordinates, schedules and provides orientation and enroll employees in City benefit programs and coordinate the annual open enrollment for all of the benefit programs offered including required health and retirement benefits, and optional programs such as life insurance, ADD, LTD, GTL, etc. 15 %
- Respond to employees inquiries about salary and benefits, conduct orientations, prepares personnel and payroll documents and provides employees an overview of the features of the different plans as employees make their benefit decisions.
 - Regularly verifies employees enrolled in the various benefit programs and compiles statistical data of this audit for the departments accounting unit for accurate payment of benefit premiums.



POSITION ALLOCATION CRITERIA:

Duty #1, a primary secondary duty, is described in the class specification as:

Technical tasks normally associated with personnel management functions; interpreting contract or ordinance information for the development of department practices, policies and decisions; requires familiarity with systems used to process a full range of personnel transactions and with the organizational structure to prepare reports.

Duty #2, a primary secondary duty, is described in the class specification as:

Technical tasks normally associated with personnel management functions; interpreting contract or ordinance provisions; plus processing personnel transactions and maintaining confidential employee files.

Duty #3, a primary secondary duty, is described in the class specification as:

Process personnel and payroll transactions, but also specialized personnel and financial program purpose and procedures monitor the convergence of human resources and financial management and the particular way in which we account for personnel services expenditures. Familiarity with systems used to process a full range of personnel transactions; as well as our department labor collection system and recommending modifications or corrections that support the human resource and financial management accountability of this work unit.

Duty #4, a primary secondary duty, is described in the class specification as:

Technical tasks such as employee orientations and processing employee benefits selections billings and related.



REASON FOR THE REQUESTED CHANGE:

The department is undergoing significant redesign including moving to a programmatic funding structure that requires DCLU to capture personnel services and other expenditures within these program funding structures. This is the reason we moved to an automated payroll system, which has removed many of the manual tasks from this assigned position. Over the last ten years the department has recognized a retention problem of being unable to keep employees in this position longer than 2.5 years. The department will take this opportunity to assign new duties such as management reporting, providing technical support for interpreting and establishing human resource policies, and utilizing human resource information systems to support human resource planning throughout the department.

Supervisor or Requester Signature

Wayne D. Spahr

Date

9/1/98

Department Head Signature

Judith J. Wall for R.F.K.

Date

9/1/98

(FOR City Personnel USE ONLY)

Position Number: _____ Title: _____

Approved as Requested: Yes No

Other Recommended Action:

S. L. Nicholson

Personnel Analyst

Sept 2, 1998
Date



Joe Bean
Personnel Analyst Supervisor

September 8, 1998
Date

Effective Date:

AbvPDQ97
06/02/97





CLASSIFICATION DETERMINATION REPORT

Date: November 5, 1998 Report No.: 98-2434

POSITION IDENTIFICATION
Department: CONSTRUCTION & LAND USE
Classification Title: LAND USE PLANNING & DEVELOPMENT ANALYST
Ordinance Title: LAND USE PLNG & DEV ANALYST
Position Number: 017586 (Rates in effect as of November 1, 1998)
Bargaining Unit: 004 Current Salary: \$21.58--\$25.11 (Range: 34.0A)

RECOMMENDED ACTION
Classification Title: SENIOR LAND USE PLANNING & DEVELOPMENT ANALYST
Ordinance Title: LAND USE PLNG & DEV ANALYST, SR
Legislation Required: YES (1997 RATES)
Bargaining Unit: 004 Recommended Salary: \$23.27--\$27.12 (Range: 36.0A)
Remarks: Pertinent allocation factors are described on the following pages.

INCUMBENT STATUS
Incumbent:
Current Standing: LAND USE PLANNING & DEVELOPMENT ANALYST
Recommended Standing: SENIOR LAND USE PLANNING & DEVELOPMENT ANALYST
In recommended standing, incumbent status is:
 Regular; Probationary; Temporary.
Authority: Article 9 of the Agreement between the City and IFPTE, Local 17
Remarks:

Recommended: SharonLee Nicholson Classification/Compensation Analyst(s)
Approved: John Pearson Classification/Compensation Supervisor
Dean Barnes, Acting Classification/Compensation Director
Norma McKinney Personnel Director



Source of Request and Position Identification:

This review is being conducted at the request of the Code Development and Community Relations Division of the Construction and Land Use Department. This Division develops policy and code related to the Land Use Code. The staff in this unit also amend or develop other codes such as SEPA, environmentally critical areas, grading and drainage and housing. The position also participates in policy and code development related to the Comprehensive Plan, land use policies, neighborhood planning related to rapid transit. According to information provided by management, the responsibilities of this position have grown in parallel with a substantial increase in the Division's obligations to implement land use and neighborhood planning efforts.

Position History:

Information related to the history of Position No. 017586 can be obtained in the Records and Information Unit of the Personnel Division.

Scope of Review:

This review was conducted by SharonLee Nicholson, a member of Class/Comp 98Team2. The review of the subject position included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) submitted for this review;
- ◆ Class Spec for *Land Use Planning & Development Analyst* ;
- ◆ Class Spec for *Senior Land Use Planning & Development Analyst*;
- ◆ Other information internally available.

Summary of Work:

This position is directly and independently responsible for coordinating the department's efforts in the City's neighborhood planning process. This responsibility includes leading the work of other *Land Use Planning & Development Analysts*. The primary responsibility of the position is to provide expert advice, handle land use programs (e.g. neighborhood planning) and coordinate the department's role in responding to initiatives involved in a particular program area. Finally, the position manages the work of staff to meet obligations of a particular work program (excluding conventional supervisory responsibilities). Major tasks of the position are distributed as follows:

- 45% Independently prepare, review and analyze complex policy and code development initiatives such as neighborhood planning, environmentally critical areas, Sound Transit, etc.; prepare written analyses and recommendations on these Citywide issues.
- 15% Develop schedules, distribute work load and project designs among staff responsible for neighborhood planning. Work with neighborhoods to address key issues; notify neighborhoods of issues and processes; assist staff to respond to neighborhood plan identified issues and other assignments
- 20% Represent department in decision making arenas; anticipate policy issues and evaluate regulatory program impacts on other DCLU program areas.



Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.

Analysis:

According to a review of the class specs, the differences are subtle between the senior and journey level classes of the *Land Use Planning and Development Analyst* series. According to Schematic No. 5000004, the journey level

...is distinguished from the senior level by its responsibility for the independent analysis, administration and defense of all but the most complex and controversial land use decisions and/or policy and program initiatives. [*emphasis added*]

Specific examples of senior-level tasks include briefing management, City Council and the Mayor's Office on sensitive land use issues involving regulations, project proposals, reports, etc. According to the PDQ submitted for this review, the incumbent in this position "Represents the department in briefings before the City Council, the Mayor and staff and other elected or executive staff..." Another distinguishing characteristic of the senior level is that a position in that class may lead the work of other *Land Use Planning & Development Analysts*, a responsibility of Position No. 017586 according to materials submitted.

Summary:

Our review indicates that, over time, the work of Position No. 017586 has increased in responsibility, complexity and variety; therefore, the appropriate classification is at the senior level of its current series.

Recommendation:

Based on the above analysis, we recommend the subject position be reclassified to *Senior Land Use Planning & Development Analyst*. The effective date of this recommended action is August 25, 1998, the date the incumbent signed the PDQ.

Costing

If this report is implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of this action would be \$6,930.17 which includes current and retroactive costs. The ongoing annual cost of this action would be \$4,891.88. The calculations are based on the difference between the top step of the current salary range and that of the recommended salary range and includes statutory benefits (FICA, etc.). The actual amount payable to the affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: October 1, 1998

Report No.: 98-2437

POSITION IDENTIFICATION

Department: Construction and Land Use
Classification Title: Strategic Advisor 2 - Engineering and Plan Review
Ordinance Title: Strategic Advisor 2 - Engineering and Plan Review
Position Number: 011587
Bargaining Unit: 140 Current Salary: \$25.20 - \$34.02

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Manager 3, - Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$29.08 - \$39.26
Remarks: Reclassification effective 9/14/98

INCUMBENT STATUS

Incumbent: Vacant
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.

Recommended: Team 1 *shf* Class/Comp Analyst
Approved: Edie Jorgensen *EJ* Class/Comp Supervisor
Lidia Santiesteban *LS* Class/Comp Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Department of Construction and Land Use. This position will serve as Director of the City's Design Center, which will incorporate the Seattle Design Commission. The Design Center will provide the overall framework for the City's design-related review of development proposals and coordinate the full range of design support.

ANALYSIS AND RECOMMENDATION

Scope of Review: The position was reviewed by a team of class/comp analysts and rated for both Manager and Strategic Advisor. The point factor analysis yielded 625 points for Strategic Advisor and 606 points in the Manager point factor system, resulting in its allocation to Manager 3. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/120	Low/53	Med/93	Low/47	Low/43	High/130	High/120

The department has requested that this position be exempt from Civil Service. The position meets the exemption criteria for "a high level of responsiveness and individual accountability required." The position will have responsibility for the City's Design Center, including managing finances for the Center. The position must be highly responsive to the Design Commission, the Mayor's objectives, community issues, and other departments and agencies involved in the work of this position. Many controversial issues will be addressed by this position and the work of the Design Center will impact the overall quality of life in the City over the long term.

Recommendation:

Based on the duties and responsibilities, we recommend that this position be designated as Manager 3, Exempt, effective September 14, 1998, the date the PDQ was signed.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action, using rates in effect on the date of this report, would be \$14,797.34. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be \$11,098.00. The calculations are based on the differences between the mid-points of the current and the recommended salary ranges and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: 11/25/98

Report No.: 98-2503

POSITION IDENTIFICATION

Department: Construction and Land Use
 Classification Title: Manager III (old title)
 Ordinance Title: Manager III (old title)
 Position Number: 019038
 Bargaining Unit: 030 **Current Salary:** \$23.78hr. - \$27.73hr (Range - 37.5A)

RECOMMENDED ACTION

Classification Title: Engineering and Plans Review Manager 3
 Ordinance Title: Manager 3, Engrng&Plans Rev
 Legislation Required: Yes
 Bargaining Unit: 140 **Recommended Salary:** \$ 29.08hr. - \$39.26hr. (No Range)
 Remarks

INCUMBENT STATUS

Incumbent:
 Current Standing: Not Applicable
 Recommended Standing: Not Applicable
 In recommended standing, incumbent status is: Not Applicable
 Regular; Probationary; Temporary.
 Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.

Recommended:	Carla Coward <i>chc</i>	Class/Comp Analyst
Approved:	John Pearson <i>JP</i>	Class/Comp Supervisor
	<i>QJB</i>	Class/Comp Director
	Norma McKinney <i>NM</i>	Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request submitted by the Department of Construction and Land Use, Inspection Services Unit. The Department believes that the current Manager III title is not appropriate based on the level of strong leadership, community responsibility and the coordination of controversial code enforcement with other inter-agency and citizen groups. In addition, this position was vacant last year during the Manager classification review and was not included in the project.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Managers or Strategic Advisor Program. The point factor analysis yielded 718 points in the Manager point factor system. Manager 3 is the most appropriate allocation due to the description of primary work duties. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
High/180	Med/107	Low/47	Low/47	Med/87	High/130	High/120

Recommendation:

Based on the duties and responsibilities, we recommend that this position be allocated as an Engineering & Plans Review Manager 3, effective October 8, 1998, the date the MPDQ was signed.

Costing

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action would be \$19,591.87. Using rates in effect as of November 1, 1998, this figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost through the end of 1999 for this action would be \$15,673.50. The calculations are based on the difference between the top step of the current salary and the midpoint of the recommended salary pay zone and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: September 16, 1998 Report No.: 98-2427

POSITION IDENTIFICATION
Department: Executive/Strategic Planning Office
Classification Title: New/N/A
Ordinance Title: New/N/A
Position Number: 026519
Bargaining Unit: N/A Current Salary: N/A

RECOMMENDED ACTION
Classification Title: Unclassified, exempt
Ordinance Title: Strategic Advisor 1, Exempt
Legislation Required: Yes, to correct title and Civil Service exempt status
Bargaining Unit: 140 Recommended Salary: \$21.33 - \$28.79 (Range N/A)
Remarks: Effective date is September 1, 1998, per Ord. #119105.

ANALYSIS AND RECOMMENDATION
Per the attached MPDQ, position # 026519 meets the intent of Strategic Advisor 1, Exempt. We therefore recommend that this position be designated Strategic Advisor 1, Exempt.

Recommended: Team 1 *eds sil* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
Lidia Santiesteban *LS* Classification/Compensation Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Department/Strategic Planning Office.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Managers and Strategic Advisor Program. The point factor analysis yielded 450 points in the Strategic Advisor point factor system resulting in its allocation to Zone 1. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/Fiscal	Human Resources	Communications	Matrix
75	175	50	0	0	100	50

Recommendation:

Based on the duties and responsibilities, we recommend that this position be designated Strategic Advisor 1, Exempt, effective September 1, 1998 .



CLASS/COM-
 AUG - 4 1998
 FILE #

**MANAGER & STRATEGIC ADVISOR
 POSITION DESCRIPTION QUESTIONNAIRE**

EMPLOYEE SECTION

Date: 7/21/98	
1.	Submitted By:
Phone Number: x45462	Mail Stop: 01-03-01
Department: Strategic Planning Office	Division: Transportation

2.	Current Position Information:
Position Holder(s)	Position Number(s)
1) vacant—new (.5 fte)	26112
2) vacant—new (1.0 fte)	26113
3) vacant—new (1.0 fte)	26114
4) vacant—new (1.0 fte)	26115 024519
Current Ordinance Title: Strategic Advisor II	
Work Address: Municipal Building (or tbd)	
Immediate Supervisor's Name: Jared Smith functional supervisor-(S. Antupit: Tech Proj. Man.)	
Title: Assist Director	Phone # 684-8373
Next Higher Supervisor's Name: Lizanne Lyons.	
Title: Director	Phone # 684-5462

PLEASE NOTE: You are invited to use additional sheets for any section on this form if you need them.

Under the section headed Current Position Information, list both the name(s) of the employee(s) and the number(s) identifying the position(s) they hold. Another term for Ordinance Title is Payroll Title, which may not be the same as your working title. Contact your department's Human Resources Representative or City Personnel's Records Unit for the position number information of the position's Ordinance Title.

3.	POSITION SUMMARY <i>Briefly summarize the work of this position in 1 to 5 sentences. (To be completed by employee, supervisor or HR Unit of a department)</i>
<p>Station Area Planners will: Provide planning and development expertise & urban design guidance for preparation of (up to 6) station area plans for Sound Transit's LINK Light Rail stations; direct station area planning consultant work on station area plans in respective assignment areas; assure collaboration between the City and staff at Sound Transit and King County Metro, as well as with major institutions, community interests, property owners and businesses, and others on station area design & planning issues; provide direction for the City's Station Area Planning team's Stakeholder Specialist and Development Partnership Specialist; convene and staff the volunteer community advisory Station Area Planning groups; assure communication/participation and review/response by City staff on detailed Station Area Plan issues.</p>	



4.	Reason For Request
<p><i>Please identify the date this position was last reviewed, the reason for submitting this new request for review and specify the changes that have occurred in duties and responsibilities since the last review.</i></p>	
<p>Per Ordinance # 118927, the City has entered into a \$2.5 million contract to provide these Station Area Planning services to Sound Transit. These are new positions created for Sound Transit Station Area Planning activities during 1998-2000.</p>	

5.	Point Factor Questions
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Please answer the following questions as thoroughly as possible, give examples of work where appropriate and estimate the percentage of time spent performing a particular function.

It is easiest to think of a job as a time block, such as an 8 hour day, a 40 hour week, a bi-weekly pay period, a month, or a year. Within this time block, roughly estimate how much time is spent performing each duty.

% 4	A. Human Resources Management - refers to managing, monitoring and administering human resources, including direct and indirect supervision.
-----	---

1. Do you manage subordinate supervisors? Yes or No. (Underline one)
If yes, how many? N/A
2. How many staff do you supervise in total, including those who report directly to you and those who report through subordinate supervisors? Please list specific positions. N/A
3. Do you provide lead direction, including assigning, monitoring and reviewing work?

Yes; provide lead direction to senior level planning staff and technical staff within the Mayor's Strategic Planning Office and within the City's Interdepartmental Team for Station Area Planning (OED, DCLU, DON, Seatran, Parks, DHHS).

% 4	B. Budget/Fiscal Management - refers to managing, monitoring and administering resources.
-----	--

1. What is your role in budget or fiscal management?
- This position provides policy-level direction on financial and budget issues on capital improvements and CIP project prioritization, via working with management, directors of line departments, and the Mayor's City Budget Office, Mayor, and Council.



2. What is the impact of your budget and/or fiscal recommendations on City services, programs or activities?

The Station Area Planning budget has implications for the City's Capital Improvement Program (CIP), including CIP prioritization, coordination, and project development. This position must keep various policy, financial, and planning staff abreast of any significant financial issues brought about by station area project planning work and recommendations.

3. What is the size of the budget which you administer? Position does not administer a budget but project totals \$2.5 million in funds from Sound Transit.

4. How many separate funding sources do you manage? Do these have specialized funding source requirements?

One; the Station Area Planning funds are provided by Sound Transit under its contract with the City that specifies that the City will deliver Station Area Plans. There are additional General Fund and other utility CIP capital project funds which are subject to policy level recommendations of these positions.

5. Are you required to manage significant contracts as part of your job? If so, please give examples.

Yes; the position will provide direction on subtasks to members of the SPO-retained consultant team (contract value of \$750,000).

6. Are you responsible for developing or implementing strategies designed to save the City money?

Yes. This position may develop strategies designed to save the City money, to the extent that Station Area Plan implementation measures will direct other public agencies (e.g., King County, Sound Transit, WSDOT, FTA) and/or private developers to construct and dedicate to the City (portions of) public facilities.

% 4	C. Program Management - refers to responsibility for developing, implementing, advocating, administering and evaluating identifiable programs(s). A program has an identified set of policies, procedures, budget, identified and measurable outcomes associated with it, and has clear boundaries in relation to other programs and activities.
-----	---

1. Do you manage a program or programs as defined? Yes or No. (underline one)

2. If yes, what program(s) do you manage?

This position is responsible for developing a set of plans for numerous Seattle neighborhoods affected by construction of the 17 light rail stations scheduled to be built by Sound Transit, pursuant to the \$1.4 billion (1995 \$) Sound Transit Light Rail Plan.



3. How are the objectives for this or these programs set? Who sets them?

The objectives of the Station Area Planning program are set by the State's Growth Management Act and High Capacity Transit Legislation, the Seattle Comprehensive Plan, actions by the Seattle City Council, and direction by Mayor Paul Schell.



4. Please describe your role in program development. Do you have any responsibility for making program recommendations? Please describe.

Yes; program development includes developing timelines for community involvement, developing detailed recommendations, interacting with Council, and preparing Mayoral recommendations to Council to support implementation of these station area plans.

5. What is your role in defining measurements and assessing accomplishments for this program or these programs? To whom are these measurements reported?

This position designs policies and identifies City priorities that will be implemented over the life of the Sound Transit project. The position will assess progress of plan design and provide measurements for success to senior policy makers in the City and to the Mayor and Council.

6. What is the impact of this or these programs on external constituents?

Major land use decisions, private and public investments, overall community development around light rails stations will be made based on the work of this position. Analysis provided and decisions made have significant impacts on revenues, property values, community health, and public safety. Additionally financial risk issues for the City and Sound Transit are significant.

% 50	D. Policy Management - refers to responsibility for developing, implementing and advising decision-makers on policy.
------	---

1. Do you develop, recommend or provide input to policies which directly impact the public? Please describe.

Yes; this position(s) has the primary City responsibility for developing and recommending policy recommendations to the Mayor and Council on land use, economic development, and transportation investment policies for areas around the 17 light rail stations throughout the City of Seattle constructed by the Sound Transit System.

2. What is your role in presenting and defending policy recommendations to elected officials, executive decision-makers or department directors?

This position will directly make presentations on policy and planning recommendations to the Mayor, City Council, and City department directors. The position will be responsible for also preparing all background materials, staff reports, and planning issue analysis, in addition to working with stakeholders and community members on developing policy options.

3. What are the impacts of such policies on the City's ability to fund and deliver programs and services?

Policy recommendations formulated by this position and recommended directly to the Mayor and Council will have major impacts on the City of Seattle's public transportation infrastructure and a variety of community facilities and services. Negative impacts could include: a decreased level of economic vitality due to inappropriate station area development design; compromised transportation system functionality due to conflicts in planning coordination;



and public safety problems due lack of adherence to crime prevention through environmental design principles.

4. What might the duration of this policy impact be - immediate or short-term, a year or more, or long-term and cumulative? Why?

The duration of these policy impacts will be cumulative and long-term, up to 100 years' duration, due to the long-term nature of transportation capital improvements and how urban development is influenced by the City's Land Use Code.



% 30	E. Technical Management - refers to responsibility for technical expertise, typically in a technological or scientific discipline, including such elements as managing expert staff, serving as a strategic advisor or expert, and having technical competencies spanning various disciplines.
------	---

1. Do you or your staff deal regularly with technical, legal or highly-analytical issues? What types of issues?

Yes. Issues dealt with include urban design, land use planning, joint development, streetscape and urban open space design, non-motorized transport facility planning, and local transit service concept design.

2. Please describe your role as technical expert or strategic advisor of specialized expertise.

This position will provide very technical and highly specialized professional expertise in the areas above and assure that policy recommendations and Station Area Plan elements represent the highest quality technical input on these issues.

3. Does this work require specific licenses or degrees? What are these requirements?

Graduate degree in Urban Design, Landscape Architecture, Architecture, Planning or closely related field with at least five (5) years related professional experience is required.

% 4	F. Communications Management - refers to effective representation of the City or City interests before internal and/or external constituencies or as part of group processes.
-----	--

1. Does your position require you to represent your department or functional area before internal and/or external constituencies? Please describe.

This position will represent the Mayor, as well as its City's Strategic Planning Office and Station Area Planning team, in presenting issues and working with community groups, property owners, business associations, other public agencies on station area plans.

2. What types of issues make up your major communication challenges?

Major issues facing this position include working closing with stakeholders that possess varying levels of technical knowledge and widely diverse concerns and needs. The position must be able to communicate effectively in writing and verbally in many settings, formal and informal, taking into consideration the sensitive nature of the diverse views.

3. Does your job require you to manage or promote on-going relationships with external constituencies? Please describe.

Yes, this job requires the establishment and maintenance of good working relationships throughout the Station Area Planning process as noted in #2 above.

4. Does your job require garnering support, shaping opinions, advocating controversial



positions or achieving important City objectives? Please describe.

Yes; this position requires performing all of these tasks with regard to land use and economic development, public facility siting, and regional mobility improvements in conjunction with light rail station area development. The City's overall success with station area planning is dependent on these positions' effectiveness in advocating certain positions that will achieve important City objectives.

% 4	G. Matrix Management - refers to coordinating and/or integrating functions, systems, or programs, and managing, leading and/or facilitating the work of individuals, groups or teams across functional, departmental and/or jurisdictional lines without full managerial/supervisory control, including administrative managers across functional lines, and the management of non-employees such as contractors and volunteers.
-----	---

1. Do you actively manage and/or represent the priorities and interest of elected officials and/or Department Heads on cross-functional, cross departmental or cross jurisdictional teams? Please describe.

Yes; this position must represent the priorities and interests of elected officials and Department heads on all of the teams mentioned above in working with diverse stakeholders.

2. Is matrix management and/or leadership a significant part of your job? What types of issues do you deal with?

Position must be seen as accountable to decisionmakers and other stakeholders for producing policy and plan recommendations. Leadership skills are required to create a efficient and smooth transition to full implementation of the plans.

3. Which occupations, organizations, etc. are represented on teams which you manage or participate on?

Planning, transportation, engineering, design, community outreach organizations/groups will be involved in this project and required for this position to effectively involve either through membership in these groups or participation with them in their planning.

4. Are you required to facilitate public involvement processes? Please describe the type and purpose of these public involvement processes.

Yes. Building on the work of currently-engaged neighborhood planning participants, this position conducts public outreach and provide opportunities for diverse stakeholder participation (including property owners, business associations, major institutions) to build consensus on future development around the light rail stations.

Total % = 100

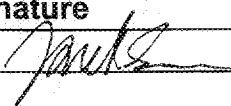
6.	List examples of decisions you make when guidelines are not available.
<i>Decisions might include choosing approaches to solve problems, providing input to the work plan, selecting staff.</i>	



Develop recommendations to the Mayor and City Council on specific capital investments, Land Use Code, Zoning map, and Street Improvement manual amendments.

Decide where to expend City staff time and consultant effort; decide which issues to deal with at variety of venues, such as Interdepartmental Team, Department Directors, Mayor and City Council.



7.	Signature Section (If signature is other than the current incumbent, please indicate relationship to this position.)		
I (we) certify that the entries on the Employee Section are accurate and complete.			
Signature	Date	Signature	Date
			8/4/98

IMMEDIATE SUPERVISOR SECTION

Items #8 through #18 are to be completed by the immediate supervisor.

8.	Describe the purpose of the work unit or area.
<p>Per Ordinance # 118927, the City has entered into a \$2.5 million contract to provide Station Area Planning services to Sound Transit. The City's responsibilities include developing Station Area Plans for each of the 17 light rail stations within City limits. The City's Station Area Planning work includes public and stakeholder involvement activities, market development analysis and development of strategies, facilitation of transit-oriented development partnerships, and the preparation of Station Area Plans. The Station Area Planner positions are new positions that are required by the City in order to fulfill its ordinance-mandated Station Area Planning responsibilities during 1998-2000.</p>	

9.	Describe the purpose of the employee's position.
<p>Station Area Planners will: Provide planning and development expertise & urban design guidance for preparation of (up to 6) station area plans for Sound Transit's LINK Light Rail stations; direct station area planning consultant work on station area plans in respective assignment areas; assure collaboration between the City and staff at Sound Transit and King County Metro, as well as with major institutions, community interests, property owners and businesses, and others on station area design & planning issues; provide direction for the City's Station Area Planning team's Stakeholder Specialist and Development Partnership Specialist; convene and staff the volunteer community advisory Station Area Planning groups; assure communication/participation and review/response by City staff on detailed Station Area Plan issues.</p>	

The supervisor should not alter any statements made by the employee on the previous pages, but may comment on them in the space provided below.

10.	Indicate any exceptions or additions to the employee's statements.
N/A	



11.	Explain the TYPE OF SUPERVISION or guidance given this employee. (see side bar)
Very limited after being provided general direction from Supervisor. Acts very independently in dealing with Mayor, Council, etc.	
12.	Minimum level/type of education required for this position:
Graduate degree in Urban Design, Landscape Architecture, Architecture, Planning or closely related field.	
13.	Minimum length of time and type of experience required for this position:
At least five (5) years' professional experience in Urban Design, Landscape Architecture, Architecture, Planning or closely related field.	
14.	Special licenses, registration, or certification required for this position:
None.	
15.	Special skills or unusual working conditions required for this position:
Participation in evening meetings and public workshops. Must have problem-solving and strong facilitation and team-building skills.	
16.	Describe any training (formal, informal on-the-job, or in-service) required after hire.
None anticipated.	

TYPES OF SUPERVISION

Close Supervision: You give the employee specific instructions on virtually all assignments and review the work for completeness and accuracy, or the employee performs tasks which provide inherent checks built into the nature of the work.

Continuing Supervision: You provide continuing or individual assignments by indicating generally what is to be done, limitations, quality and quantity expected, deadlines and priorities. You give additional, specific instructions for new, difficult, or unusual assignments. The employee uses initiative in carrying out recurring assignments. You assure that the work is technically accurate and in compliance with instructions or established procedures.

General Supervision: You make assignments by defining objectives, priorities and deadlines and assist the employee with unusual situations which do not have clear objectives. The employee plans and carries out successive steps and resolves problems and deviations in accordance with instructions, policies, and accepted practices. You review the work for technical adequacy and conformance with practice and policy.

Limited Supervision: You set the overall objectives and resources available. You and your employee, in consultation, develop the deadlines, projects, work to be done. The employee plans and carries out the assignment, resolves most of the conflicts, coordinates work with others and interprets policy on own initiative. The employee keeps you informed of progress, potentially controversial matters, or far reaching implications.

Managerial Direction: You provide the employee with assignments in terms of broad practice, precedents, policies, and goals. Work may be reviewed for fulfillment of program objectives and conformance with departmental policy and practice.

Long-Range Managerial Direction: The employee generally proceeds independently in accordance with general plans, policies and purposes of the department. Results of work are considered technically authoritative and are normally accepted without significant change.

17.	List other factors or aspects of the job that should be considered in evaluating this position.



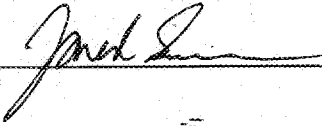
The City's contract with Sound Transit (per Ordinance # 118927) requires the performance of these specific functions which are beyond the City's current staffing/position authority and budget.

18. I certify that the entries on all previous sections are accurate and complete with the exceptions noted.

Supervisor's Signature:

Date:

7/31/98



APPOINTING AUTHORITY SECTION

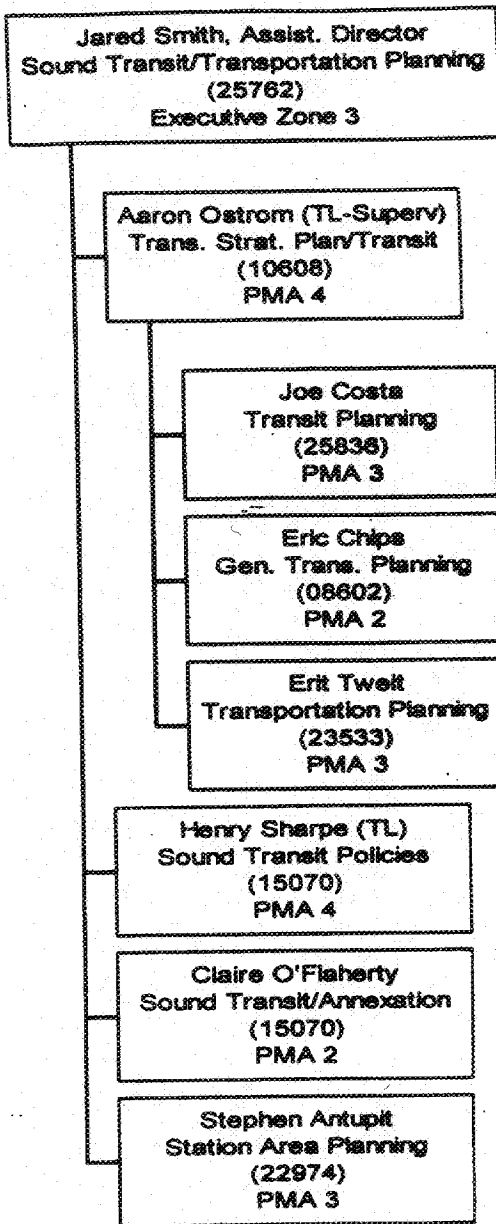
Items #19 through #21 are to be completed by the Appointing Authority (or Designee)

19. ORGANIZATIONAL CHART

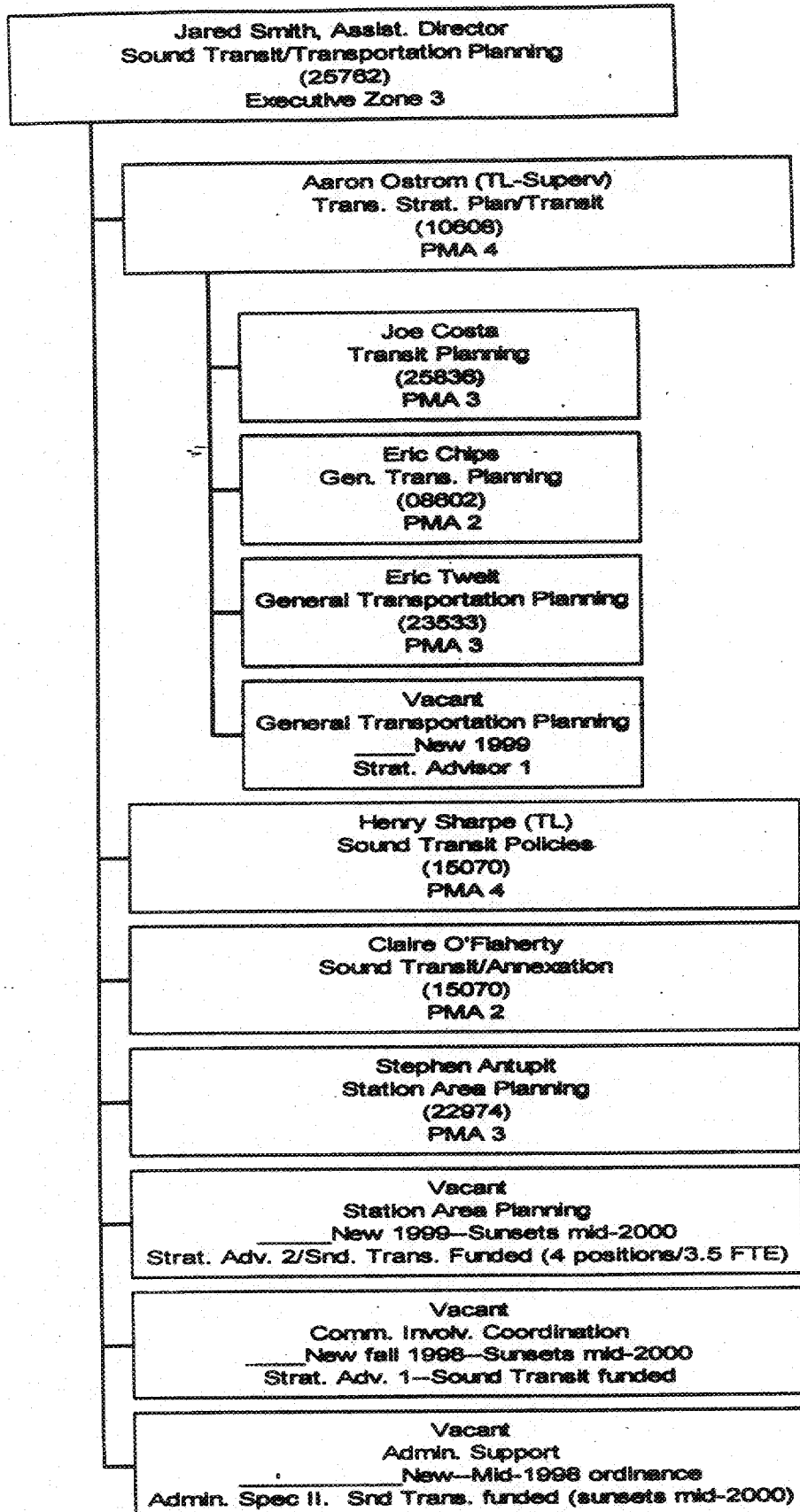
In the spaces provided below, sketch your organizational chart. The chart should show the name/title of the person supervising the position and the name(s) or title(s) of persons reporting to this position. If you have an existing organizational chart that conveys this information, feel free to attach it instead of drawing it here.

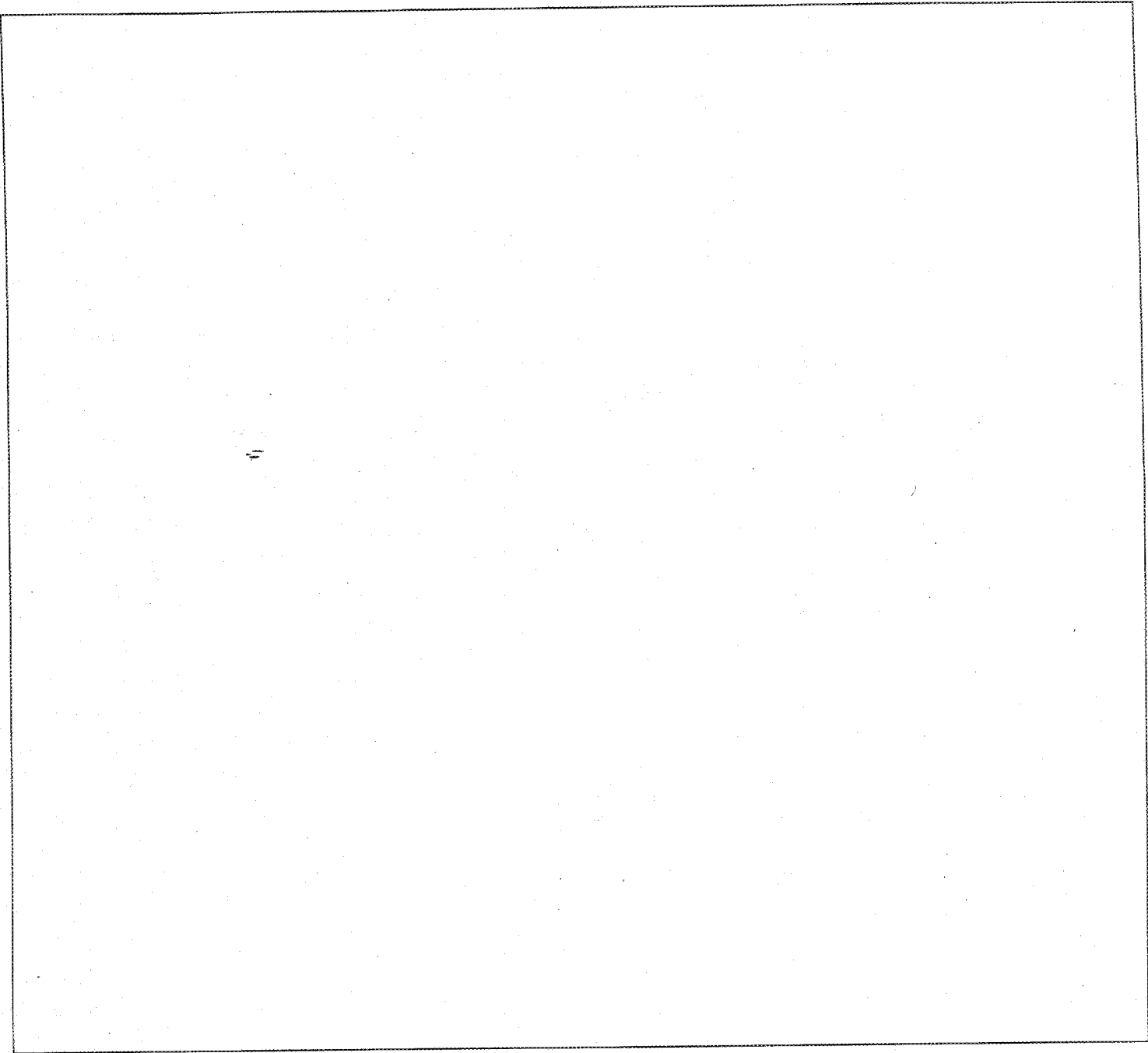


1998 Strategic Planning Office Organization Sound Transit/Transportation Section



1999-2000 Strategic Planning Office Organization Sound Transit/Transportation Section





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The appointing authority (or designee) should not alter any statements made by the employee or their supervisor on the previous pages, but may comment on them below.

20. Indicate any exceptions or additions to the statements on the Employees or Immediate Supervisor Sections.

N/A

21. As the Appointing Authority (or designee), I certify that the entries on all previous sections are accurate and complete with the exceptions noted.

Appointing Authority's (or Designee's) Signature

[Handwritten Signature]

7/29/98
Date




November 16, 1998

**EXECUTIVE SERVICES DEPARTMENT, PERSONNEL DIVISION
APEX MARKET GROUP ALLOCATION
EXECUTIVE COMPENSATION REVIEW COMMITTEE**

POSITION IDENTIFICATION:

Department:	Strategic Planning Office
Current Job Title:	Strategic Advisor 3, Exempt
Current Incumbent:	Rick Dupree
Position Number:	022961
Current Sal Range Top Step:	\$81,967
Requested Market Group:	Executive 1 (effective 8/10/98)

ECRC DECISION:

ECRC approves as follows:	
Market Group:	<u>1</u> [Class/Comp recommendation: 1]
Effective date:	<u>8-10-98</u> [Class/Comp recommendation: 8/10/98]
Authorized To Compensate in Adjoining Market Group:	<u>N/A</u>
Signature of ECRC Representative:	
Date of ECRC Approval:	<u>11-20-98</u>

ANALYSIS: SPO is requesting that this existing Strategic Advisor 3 position be redesignated as Executive 1, effective 8/10/98 (the date the current incumbent was hired and the date the duties on the JSQ went into effect). The position will be one of five assistant director positions in SPO, and will be in charge of Health and Human Services policy planning. The position will be instrumental in formulating and recommending human services policies to the Mayor.

The review team rated Hierarchical Orientation as Low; the position will have a small staff of direct reports, but will have matrix responsibilities with other City departments. Strategic Significance was rated as Medium; the position will develop and recommend policy but will not be in charge of programs that ensure the outcome. Scope and Impact were rated as Low; the position has a minimal budget and staff of its own, and will have significant but indirect impact on the customer base of other departments and agencies.

Overall, these ratings support the requested level of Executive 1. By comparison, the Director for Education is also an Executive 1 in SPO, and is similar to this position in that it has a small direct span of control but the potential for major indirect impact in its policy advisory capacity. We recommend the position be redesignated as Executive 1, effective 8/10/98 as requested by SPO.





CLASSIFICATION DETERMINATION REPORT

Date: October 29, 1998 **Report No.:** 98-2526

POSITION IDENTIFICATION

Department: Executive- Strategic Planning Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: See Exhibit A
Bargaining Unit: 130 **Current Salary and Range:** \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 1, Exempt
Legislation Required: Yes
Bargaining Unit: 140 **Recommended Salary:** \$21.33 - \$28.79 (No Range)
Remarks: Resignation effective March 28, 1998.

INCUMBENT STATUS

Incumbent: See Exhibit A
Current Standing: NA
Recommended Standing: NA
 In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 Classification/Compensation Analyst(s)
Approved: Edie Jorgensen Classification/Compensation Supervisor
 _____ Classification/Compensation Director
Norma McKinney Personnel Director



SOURCE OF REQUEST

These positions were reviewed as a result of a request from the Executive Department, Strategic Planning Office (SPO). SPO is a newly created office responsible for acting as a resource to the Executive (Mayor and staff) in developing policies and plans which further the goals of the Administration pertaining to complex matters. These positions are responsible for research, policy analysis and development, problem solving, and report development on a range of policy and planning subjects that includes, but is not limited to, transportation, community and neighborhood development, regional planning and growth management, comprehensive planning, housing, human services, education, and environmental issues. These positions make recommendations to the SPO Director and the Mayor; present and define policy and planning issues to the City Council, department staff and community groups; and present and defend mayoral policies and plans as a member of interdepartmental teams, governmental groups, regional groups and issue advisory groups, and provide leadership to such groups as primary coordinator for policy/project completion.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created: the Strategic Planning Office (SPO) and the City Budget Office (CBO). With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst(s) (PMA), the SPO requested the position(s) be reviewed for possible inclusion into the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive financial issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality), the SPO also requested that the positions continue to be exempt in their allocations.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 275 points, placing the position in the Pay Zone 1. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Low/0	Med/175	Low/0	Low/0	Low/0	Med/50	Med/50

It is recommended these positions continue to be exempt from civil service rules. They work on sensitive issues requiring a particularly high degree of individual professional



accountability, responsiveness and confidentiality. These positions are responsible for the development and management of core policy planning issues which will affect the operation of the City's operating departments and all of our citizens over the next several years. As SPO is viewed and used by the Mayor as an extension of the Mayor's Office, the work of these positions necessitates the highest level of confidentiality and accountability. With this confidentiality, a full spectrum of policy options may be explored in draft format in various forms not yet ready for public viewing. A breach of confidential issues, discussions, proposals, and/or concepts could result in great damage in the ability to execute the Mayor's goals for the City. Additionally, these positions will be, at various times, accountable in an advisory capacity directly to high level SPO Executive management, City Council and the Mayor on the development of these policy issues.

Based on the duties and responsibilities, we recommend that this position be designated as a Strategic Advisor 1, Exempt, effective March 28, 1998, the date the SPO was created.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, there is a cost savings to the department of \$142,692.10. The ongoing annual savings would be \$77,832.05. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.



REPORT NO. 98-2526

RECOMMENDED SALARY: \$21.23- \$28.29 (No Range)

RECOMMENDED CLASSIFICATION TITLE: Exempt

RECOMMENDED ORDINANCE TITLE: Strategic Advisor I, Exempt

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 008602

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 010427

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 015070

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 020676

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:



REPORT NO. 98-2526

RECOMMENDED SALARY: \$21.23- \$28.29 (No Range)

RECOMMENDED CLASSIFICATION TITLE: Exempt

RECOMMENDED ORDINANCE TITLE: Strategic Advisor, Exempt

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 022357

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 025835

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:





CLASSIFICATION DETERMINATION REPORT

Date: Nov. 6, 1998 Report No.: 98-2527

POSITION IDENTIFICATION


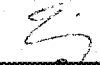


Department: Executive- Strategic Planning Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: See Exhibit A
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 1, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$21.33 - \$28.79 (No Range)
Remarks: Resignation effective 3/28/98.

INCUMBENT STATUS

Incumbent: See Exhibit A
Current Standing: NA
Recommended Standing: NA
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1  Classification/Compensation Analyst(s)
Approved: Edie Jorgensen  Classification/Compensation Supervisor
-----  Classification/Compensation Director
Norma McKinney  Personnel Director



SOURCE OF REQUEST

These positions were reviewed as a result of a request from the Executive Department's, Strategic Planning Office (SPO). SPO is a newly created office responsible for acting as a resource to the Executive (Mayor and staff) in developing policies and plans which further the goals of the Administration pertaining to complex matters. These positions are responsible for research, policy analysis and development, problem solving, and report development on a range of policy and planning subjects that includes, but is not limited to, transportation, community and neighborhood development, regional planning and growth management, comprehensive planning, housing, human services, education, and environmental issues. These positions make recommendations to the SPO Director and the Mayor; present and define policy and planning issues to the City Council, department staff and community groups; and present and defend mayoral policies and plans as a member of interdepartmental teams, governmental groups, regional groups and issue advisory groups, and provide leadership to such groups as primary coordinator for policy/project completion.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created: the Strategic Planning Office (SPO) and the City Budget Office (CBO). With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst(s) (PMA), the SPO requested the position(s) be reviewed for possible inclusion into the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive financial issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality), the SPO also requested that the positions continue to be exempt in their allocations.

ANALYSIS AND RECOMMENDATION

Scope of Review: These positions were reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 425 points, placing these positions in Pay Zone 1. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Low/0	Med/75	Low/0	Med/50	Med/50



It is recommended these positions continue to be exempt from civil service rules. They work on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness and confidentiality. These positions are responsible for the development and management of core policy planning issues which will affect the operation of the City's operating departments and all of our citizens over the next several years. As SPO is viewed and used by the Mayor as an extension of the Mayor's Office, the work of these positions necessitates the highest level of confidentiality and accountability. With this confidentiality, a full spectrum of policy options may be explored in draft format in various forms not yet ready for public viewing. A breach of confidential issues, discussions, proposals, and/or concepts could result in great damage in the ability to execute the Mayor's goals for the City. Additionally, these positions will be, at various times, accountable in an advisory capacity directly to high level SPO Executive management, City Council and the Mayor on the development of these policy issues.

Based on the duties and responsibilities, we recommend that these positions be designated as Strategic Advisor 1, Exempt, effective March 28, 1998, the date the SPO was created.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using rates in effect November 1, 1998, there is a cost savings to the department of \$237,820.17. The ongoing annual savings would be \$259,440.18. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.



REPORT NO. 98-2527

RECOMMENDED SALARY: \$21.33- \$28.79 (No Range)

RECOMMENDED CLASSIFICATION TITLE: Exempt

RECOMMENDED ORDINANCE TITLE: Strategic Advisor I, Exempt

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 010609

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 011564

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 015987

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 017163

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:



REPORT NO. 98-2527

RECOMMENDED SALARY: \$21.33-\$28.79 (No Range)

RECOMMENDED CLASSIFICATION TITLE: Exempt

RECOMMENDED ORDINANCE TITLE: Strategic Advisor I, Exempt

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 020057

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 020497

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 022356

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 023489

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:



REPORT NO. 98-2527

RECOMMENDED SALARY: \$21.33-\$28.79 (No Range)

RECOMMENDED CLASSIFICATION TITLE: Exempt

RECOMMENDED ORDINANCE TITLE: Strategic Advisor I, Exempt

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 023533

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:

INCUMBENT:

DEPARTMENT: Executive- SPO

POSITION: # 025836

CURRENT SALARY: \$21.50- \$30.39 (No Range)

CURRENT CLASSIFICATION TITLE: Exempt

CURRENT ORDINANCE TITLE: Policy & Management Analyst

CURRENT STATUS: N/A

RECOMMENDED STATUS: N/A

REMARKS:





CLASSIFICATION DETERMINATION REPORT

Date: November 2, 1998 Report No.: 98-2528

POSITION IDENTIFICATION

Department: Executive/Strategic Planning Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Numbers: 010608, 021929, 022354, 022974, 025794
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 3, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$29.08 - \$39.26 (No Range)
Remarks: Redesignation, effective March 28, 1998

INCUMBENT STATUS

Incumbent: See Exhibit A
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *iy* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
WLB Classification/Compensation Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

These positions were reviewed as a result of a request from the Executive Department, Strategic Planning Office (SPO). SPO is a newly created office with the key purpose of being a resource to the Executive (Mayor and staff) in development of policies and plans that further the goals of that particular Administration on complex matters. The purpose of these positions is to undertake very high level policy and planning research and development to support the Administration in implementing its goals and programs, with the specific subject covered by each position varying over time. They also have supervisory or lead responsibility for staff and or lead responsibility for Citywide projects of exceptional importance.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, SPO and the City Budget Office (CBO). With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst (PMA), the SPO requested the positions be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality), the SPO also requested that the positions continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: These positions were reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 850 points, placing the position in the Pay Zone 3. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Hi/150	Hi/350	Limited/0	Hi/150	Limited/0	Hi/100	Hi/100

Recommendation:

Since these positions met the exemption criteria (per SMC 4.13); and based on their duties and responsibilities, we recommend that these positions continue to be exempt from civil service rules, and be designated to the title of Strategic Advisor 3, Exempt. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created SPO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, the maximum estimated cost of implementing this action would be **\$84,330.23**. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be **\$45,998.31**. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).



EXHIBIT A

Date: November 3, 1998

Report #98-2528

Department:: Executive/Strategic Planning Office

Current Classification Title: Exempt Job Code: 10023
Current Ordinance Title: Policy & Management Analyst
Current Salary: \$21.50 - \$30.39 Range: No Range Bargaining Unit: 130

Recommended Classification Title: Exempt Job Code: 09372
Recommended Ordinance Title: Strategic Advisor 3, Exempt
Recommended Salary: \$29.08 - \$39.26

Effective Date: March 28, 1998.

INCUMBENT AND STATUS

Incumbent Name:
Position Number: 010608
In the Recommended standing, incumbent status is: N/A.

INCUMBENT AND STATUS

Incumbent Name:
Position Number: 021929
In the Recommended standing, incumbent status is: N/A.

INCUMBENT AND STATUS

Incumbent Name:
Position Number: 022354
In the Recommended standing, incumbent status is: N/A.

INCUMBENT AND STATUS

Incumbent Name:
Position Number: 022974
In the Recommended standing, incumbent status is: N/A.

INCUMBENT AND STATUS

Incumbent Name:
Position Number: 025794
In the Recommended standing, incumbent status is: N/A.





CLASSIFICATION DETERMINATION REPORT

Date: Nov. 10, 1998 Report No.: 98-2529

POSITION IDENTIFICATION

Department: Executive/Strategic Planning Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 025764
Bargaining Unit: 130 Current Salary: \$21.50 - \$30.39

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 1, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$21.33 - \$28.79
Remarks: Redesignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: Exempt
Recommended Standing: Exempt
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.

Recommended: Team 1 *slf*
Approved: Edie Jorgensen *EJ*
Norma McKinney *NM*

Class/Comp Analyst
Class/Comp Supervisor
Class/Comp Director
Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Strategic Planning Office (SPO). As Communications Manager, the position develops and implements a full range of communications activities including media relations, public information, internal communications and public involvement processes that encourage public input regarding City and multi-jurisdictional projects, programs, policies and services. This position was formerly located in the Office of Management and Planning (OMP) and was part of the OMP broad band pay plan implemented in 1997. OMP has been reorganized, resulting in the creation of the City Budget Office and SPO, and that broad band no longer exists. Therefore, it has been requested that this position be included in the Manager/Strategic Advisor Program.

ANALYSIS AND RECOMMENDATION

Scope of Review: The position was reviewed by a team of class/comp analysts for inclusion in the Managers and Strategic Advisor Programs. The point factor analysis yielded 450 points in the Strategic Advisor point factor system resulting in its allocation to Zone 1. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Limited/0	Limited/0	Limited/0	High/100	High/100

SPO has requested that this position be exempt from Civil Service. The position works on sensitive issues requiring a high degree of individual professional accountability and responsiveness. As SPO is viewed and used by the Mayor as an extension of the Mayor's Office, the work of this position necessitates the highest level of confidentiality. The position will explore policy options in draft format, and a breach of confidentiality could result in damage in the ability to execute the Mayor's goals for the City.

Recommendation: Based on the duties and responsibilities, we recommend that this position be designated as a Strategic Advisor 1, Exempt, effective March 28, 1998. We also recommend that the position be exempt from Civil Service.

COSTING:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost savings of implementing this action, using rates effective November 1, 1998, would be \$23,782.02 if the position were paid at midpoint. This figure includes any current and retroactive cost for this action. The ongoing annual cost savings for this action would be \$12,972.01 (assuming the position was paid at midpoint). The calculations are based on the differences between the top step of the current salary range and the mid-point of the recommended salary range and include statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: November 25, 1998 Report No.: 98-2530

POSITION IDENTIFICATION

Department: Executive- Strategic Planning Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 007921
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39
(Range: N/A)

RECOMMENDED ACTION

Classification Title: Systems Analyst, Senior
Ordinance Title: Systems Analyst, Senior
Legislation Required: Yes
Bargaining Unit: 030 Recommended Salary: \$24.61 - \$28.70 (Range: 37.5A)
Remarks: Reclassification effective 3/28/98.

INCUMBENT STATUS

Incumbent: Vacant
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *CDS* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen Classification/Compensation Supervisor
REB Classification/Compensation Director
Norma McKinney Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Department/Strategic Planning Office.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts (Carl Swanson, Susie Farrell, Irene Ogunyemi and Jimmy Woo) for inclusion in the Managers and Strategic Advisor Program. Carl Swanson wrote the report. The point factor analysis yielded 50 points in the Strategic Advisor point factor system which is insufficient for inclusion in the program. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/Fiscal	Human Resources	Communications	Matrix
0	0	50	0	0	0	0

ANALYSIS AND RECOMMENDATION

Scope of Review:

The review of the subject position also included analysis of the following:

- ◆ the Manager and Strategic Advisor Position Description Questionnaire (MPDQ) submitted for this review;
- ◆ Team 1's review/analysis of subject positions information;
- ◆ related class specifications;
- ◆ comparison to similar positions;
- ◆ review of the organization chart affecting the subject position; and
- ◆ the position's history records and related classification files.

Summary of Work:

The essential purpose of this position is to serve as a lead worker over a geographic information specialist, who will provide support to a variety of projects by providing data, analysis and maps that assist in understanding existing conditions, problems and the potential effects of policy changes for specific geographic areas of the city as SPO works on plans or policies that affect those areas.

Note: For a more complete listing of duties and responsibilities, please refer to the Managers and Strategic Advisors Position Description Questionnaire submitted for this review and included in the position file.



Analysis:**class concepts:****SYSTEMS ANALYST, SENIOR**

Positions in this class plan, develop, coordinate and analyze data processing systems to determine feasibility and practicality of requested services; diagnose system failures to isolate source of problem between equipment, system software and application programs; and may coordinate and/or serve as lead to subordinate staff.

This is the fourth level within the five-level Systems Analyst series. Positions in this class, under general supervision, analyze the impact of requested services through a variety of methods appropriate to the specialty, considering factors such as compatibility, conversion, implementation of cost, or impact on existing systems and equipment; and document alternatives and recommendations.

The subject position meets the class concept for Systems Analyst, Senior. It will be responsible for serving as a lead over one position providing technical data and mapping services to other project staff within the SPO. This involves using the City's central geographic data base to access data developed by other departments and agencies, as well as data bases developed within SPO. It also requires using geographic information system (GIS) software to perform analysis that links the data to geographic coordinates and other data. The person in this position will also prepare maps that display the information resulting from this analysis and will work with project staff to provide an understanding of the information and its limitations.

Recommendation:

Based on the duties and responsibilities assigned, we recommend that this position be allocated to Systems Analyst, Senior. The Strategic Planning Office had requested, in their memorandum of October 22, 1998, that this position be exempt from Civil Service. However, we find that this position does not meet the criteria for exemption. The MPDQ and the request memorandum do not substantiate that the position either (1) requires a high degree of responsiveness and individual accountability, or (2) requires a confidential or fiduciary relationship with the appointing authority. Therefore we recommend that the position be allocated as a Civil Service position.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using rates in effect November 1, 1998, there is a cost savings to the department of \$3427.56. The ongoing annual savings would be \$4113.08. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: Nov. 10, 1998

Report No.: 98-2531

POSITION IDENTIFICATION

Department: Executive/Strategic Planning Office
Classification Title: Senior Grants & Contracts Specialist
Ordinance Title: Grants & Contracts Specialist, Senior
Position Number: 025123
Bargaining Unit: 030 Current Salary: \$18.85 - \$22.04 (Range: 30.5A)

RECOMMENDED ACTION

Classification Title: Strategic Advisor 1, Human Services
Ordinance Title: Strategic Advisor 1, Human Services
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$21.33 - \$28.79
Remarks: Reclassification effective 3/28/98.

INCUMBENT STATUS

Incumbent:
Current Standing: Grants & Contracts Specialist, Senior
Recommended Standing: Strategic Advisor 1, Human Services
In recommended standing, incumbent status is:
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.

Recommended: Team 1 *BN* Class/Comp Analyst
Approved: Edie Jorgensen *EJ* Class/Comp Supervisor
Norma McKinney *NM* Class/Comp Director
Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Strategic Planning Office. Position number 025123 is located in the Strategic Planning Office and will act as the City's Capital Levies liaison to ensure the delivery of school capital levy projects on time and on budget. The Office for Education promotes City programs in support of the Seattle Public Schools in the interest of Seattle's youth.

ANALYSIS AND RECOMMENDATION

Scope of Review: The position was reviewed by a team of class/comp analysts for inclusion in the Managers and Strategic Advisor Programs. The point factor analysis yielded 275 points in the Strategic Advisor point factor system resulting in its allocation to Zone 1. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Limited/0	Med/175	Limited/0	Limited/0	Limited/0	Medium/50	Medium/50

Recommendation: Based on the duties and responsibilities, we recommend that this position be reclassified to Strategic Advisor 1, Human Services, effective March 28, 1998.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action, using rates effective November 1, 1998, would be \$13,474.99. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be \$7,349.99. The calculations are based on the differences between the mid-points of the current and the recommended salary ranges and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Strategic Planning Office. Position number 023647 is located in the Strategic Planning Office/Office for Education and will act as the City/Schools Liaison. The Office for Education promotes City programs in the interest of Seattle's youth in support of the Seattle Public Schools.

ANALYSIS AND RECOMMENDATION**Scope of Review:**

The position was reviewed by a team of class/comp analysts for inclusion in the Managers and Strategic Advisors Programs. The point factor analysis yielded 400 points in the Strategic Advisor point factor system resulting in its allocation to Zone 1. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med./75	Med/175	Limited/0	Limited/0	Limited/0	Medium/50	High/100

Recommendation:

Based on the duties and responsibilities, we recommend that this position be reclassified to Strategic Advisor 1, Human Services effective March 28, 1998.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost savings of implementing this action, using rates effective November 1, 1998, would be \$16,241.38 if the position were paid at midpoint. This figure includes any current and retroactive cost for this action. The ongoing annual cost savings for this action would be \$8,858.93 (assuming the position was paid at midpoint). The calculations are based on the differences between the top step of the current salary range and the mid-point of the recommended salary range and include statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: Nov. 10, 1998

Report No.: 98-2533

POSITION IDENTIFICATION

Department: Executive/Strategic Planning Office
Classification Title: Senior Planning & Development Specialist
Ordinance Title: Planning & Development Specialist, Senior
Position Number: 023648
Bargaining Unit: 030 Current Salary: \$24.61 - \$28.70 (Range: 37.5)

RECOMMENDED ACTION

Classification Title: Strategic Advisor 2, Human Services
Ordinance Title: Strategic Advisor 2, Human Services
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$25.20 - \$34.02
Remarks: Reclassification effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: Planning & Development Specialist, Senior
Recommended Standing: Strategic Advisor 2, Human Services
In recommended standing, incumbent status is:
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.

Recommended: Team 1 *ALB* Class/Comp Analyst
Approved: Edie Jorgensen *EJ* Class/Comp Supervisor
Norma McKinney *NM* Class/Comp Director
Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Strategic Planning Office. Position number 023648 is located in the Strategic Planning Office/Office for Education and will act as the Families and Education Levy Coordinator. The Office for Education promotes City programs in the interest of Seattle's youth in support of the Seattle Public Schools.

ANALYSIS AND RECOMMENDATION

Scope of Review: The position was reviewed by a team of class/comp analysts for inclusion in the Managers and Strategic Advisors Programs. The point factor analysis yielded 550 points in the Strategic Advisor point factor system resulting in its allocation to Zone 2. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
High/150	Med/175	Limited/0	Med/75	Limited/0	Medium/50	High/100

Recommendation:

Based on the duties and responsibilities, we recommend that this position be reclassified to Strategic Advisor 2, Human Services, effective March 28, 1998.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action, using rates effective November 1, 1998, would be 4,060.34 if the position were paid at midpoint. This figure includes any current and retroactive cost for this action. The ongoing annual cost savings for this action would be \$2,214.73 (again assuming the position was paid at midpoint). The calculations are based on the differences between the top step of the current salary range and the mid-point of the recommended salary range and include statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: Nov. 5, 1998

Report No.: 98-2536

POSITION IDENTIFICATION

Department: Executive/Strategic Planning Office
Classification Title: Exempt
Ordinance Title: Policy and Management Analyst
Position Number: 023553
Bargaining Unit: 130 Current Salary: \$21.50 - \$30.39

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 3, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$29.08 - \$39.26
Remarks: Redesignation effective 3/28/98

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.

Recommended: Team 1 *ALP* Class/Comp Analyst
Approved: Edie Jorgensen *EJ* Class/Comp Supervisor
Norma McKinney *NM* Class/Comp Director
Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Strategic Planning Office (SPO). Position number 023553 is located in SPO and acts as lead on health and human services issues. It was formerly located in the Office of Management and Planning (OMP) and was part of the OMP broad band pay plan implemented in 1997. OMP has been reorganized and the broad band no longer exists. It has been requested that this position now be included in the Manager/Strategic Advisor Program.

ANALYSIS AND RECOMMENDATION

Scope of Review: The position was reviewed in 1997 for inclusion in the Managers and Strategic Advisors Program. After a Reconsideration, the original ratings were revised, and that revised rating is being used for this report. The point factor analysis yielded 850 points in the Strategic Advisor point factor system resulting in its allocation to Zone 3. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
High/150	High/350	Limited/0	High/150	High/50	Medium/50	High/100

The department has requested that this position be exempt from Civil Service. The position works on sensitive issues requiring a high degree of individual professional accountability, responsiveness and confidentiality. The position is responsible for development and management of core policy planning issues which will affect the operation of the City's operating departments and citizens over the next several years. As the Strategic Planning Office is viewed and used by the Mayor as an extension of the Mayor's Office, the work of these positions necessitates the highest degree of confidentiality. The position will explore draft formats of policy options, and a breach of confidentiality could result in damage in the ability to execute the Mayor's goals.

Recommendation:

Based on the duties and responsibilities, we recommend that this position be designated as a Strategic Advisor Zone 3, effective March 28, 1998, the date SPO was created. We further recommend that the position be exempt from Civil Service.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action, using rates effective November 1, 1998, would be \$16,866.05. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be \$9,199.66. The calculations are based on the differences between the mid-points of the current and the recommended salary ranges and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: Nov. 5, 1998

Report No.: 98-2537

POSITION IDENTIFICATION

Department: Executive/Strategic Planning Office
Classification Title: Exempt
Ordinance Title: Policy and Management Analyst
Position Number: 015910
Bargaining Unit: 130 Current Salary: \$21.50 - \$30.39

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 3, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$29.08 - \$39.26
Remarks: Redesignation effective 3/28/98

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.

Recommended: Team 1 *shf* Class/Comp Analyst
Approved: Edie Jorgensen *es* Class/Comp Supervisor
Norma McKinney *nm* *RB* Class/Comp Director
Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Strategic Planning Office (SPO). Position number 015910 is located in SPO and manages the development and coordination of regional policies; and leads and participates in growth management, the comprehensive plan and land use policies. It was formerly located in the Office of Management and Planning (OMP) and was part of the OMP broad band pay plan implemented in 1997. OMP has been reorganized, resulting in the creation of the City Budget Office and SPO, and that broad band no longer exists. It has been requested that this position now be included in the Manager/Strategic Advisor Program.

ANALYSIS AND RECOMMENDATION

Scope of Review: The position was reviewed in 1997 for inclusion in the Managers and Strategic Advisors Program. After a Reconsideration, the original ratings were revised, and that revised rating is being used for this report. The point factor analysis yielded 850 points in the Strategic Advisor point factor system resulting in its allocation to Zone 3. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
High/150	High/350	Limited/0	High/150	High/50	Medium/50	High/100

The department has requested that this position be exempt from Civil Service. The position works on sensitive issues requiring a high degree of individual professional accountability and responsiveness. As SPO is viewed and used by the Mayor as an extension of the Mayor's Office, the work of this position necessitates the highest degree of confidentiality. The position will explore draft formats of policy options, and a breach of confidentiality could result in damage in the ability to execute the Mayor's goals.

Recommendation:

Based on the duties and responsibilities, and because the position meets the exemption criteria, we recommend that this position be designated as a Strategic Advisor 3, Exempt effective March 28, 1998, the date SPO was established.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action, using rates effective November 1, 1998, would be \$7,666.38. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be \$9,199.66. The calculations are based on the differences between the top step of the current salary range and the midpoint of the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: Nov. 5, 1998

Report No.: 98-2538

POSITION IDENTIFICATION

Department: Executive/Strategic Planning Office
Classification Title: Exempt
Ordinance Title: Policy and Management Analyst
Position Number: 021857
Bargaining Unit: 130 Current Salary: \$21.50 - \$30.39

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 3, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$29.08 - \$39.26
Remarks: Redesignation effective 3/28/98

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.

Recommended: Team 1 *8/11/98 CDS* Class/Comp Analyst
Approved: Edie Jorgensen *EJ* Class/Comp Supervisor
Norma McKinney *NM* Class/Comp Director
Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Strategic Planning Office (SPO). Position number 021857 is located in SPO and manages the development and coordination of regional policies; and leads and participates in growth management, the comprehensive plan and land use policies. It was formerly located in the Office of Management and Planning (OMP) and was part of the OMP broad band pay plan implemented in 1997. OMP has been reorganized, resulting in the creation of the City Budget Office and SPO, and that broad band no longer exists. It has been requested that this position now be included in the Manager/Strategic Advisor Program.

ANALYSIS AND RECOMMENDATION

Scope of Review: The position was reviewed in 1997 for inclusion in the Managers and Strategic Advisors Program. After a Reconsideration, the original ratings were revised, and that revised rating is being used for this report. The point factor analysis yielded 850 points in the Strategic Advisor point factor system resulting in its allocation to Zone 3. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
High/150	High/350	Limited/0	High/150	High/50	Medium/50	High/100

The department has requested that this position be exempt from Civil Service. The position works on sensitive issues requiring a high degree of individual professional accountability and responsiveness. As SPO is viewed and used by the Mayor as an extension of the Mayor's Office, the work of this position necessitates the highest degree of confidentiality. The position will explore draft formats of policy options, and a breach of confidentiality could result in damage in the ability to execute the Mayor's goals.

Recommendation:

Based on the duties and responsibilities, and because the position meets the exemption criteria, we recommend that this position be designated as a Strategic Advisor 3, Exempt, effective March 28, 1998, the date SPO was established.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action, using rates effective November 1, 1998, would be \$7,666.38. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be \$9,199.66. The calculations are based on the differences between the top step of the current range and the midpoint of the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.



CITY OF SEATTLE
EXECUTIVE SERVICES
DEPARTMENT



CLASSIFICATION DETERMINATION REPORT

Date: August 24, 1998

Report No.: 98-1675A

POSITION IDENTIFICATION

Department: Executive Services
Classification Title: Administrative Specialist II
Ordinance Title: Administrative Specialist II-BU
Position Number: 019610
Bargaining Unit: 035 Current Salary: \$14.00-\$15.66 (Range: 22.5B)

RECOMMENDED ACTION

Classification Title: 1) Accounting Technician III (1/2/97 to 7/7/97)
2) Assistant Finance Analyst (7/8/97 to 5/31/98)
3) Finance Analyst (6/1/98)
Ordinance Title: 1) Accounting Technician III - BU (1/2/97 to 7/7/97)
2) Assistant Finance Analyst (7/8/97 to 5/31/98)
3) Finance Analyst (6/1/98)
Legislation Required: Yes
Bargaining Unit: 035 1) Recommended Salary: \$15.36-\$17.22 (Range: 25.0B)
030 2) Recommended Salary: \$15.94-\$18.55 (Range: 27.0A)
030 3) Recommended Salary: \$20.04-\$23.35 (Range: 33.0A)
Remarks: **Reclassification.** Effective date is 1/2/97 for Accounting Technician III,
7/8/97 for Assistant Finance Analyst and 6/1/98 for Finance Analyst

INCUMBENT STATUS

Incumbent:
Current Standing: Administrative Specialist II-BU
Recommended Standing: 1) Accounting Technician III-BU (1/2/97 to 7/7/97)
2) Assistant Finance Analyst (7/8/97 to 5/31/98)
3) Finance Analyst (6/1/98)
 Regular; Probationary; Temporary (resume audit required)
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks: Standing is Temporary in all titles

Recommended: Team 1 SKL Classification/Compensation Analyst(s)
Approved: Edie Jorgensen EJ Classification/Compensation Supervisor
Lidia Santiesteban LS Classification/Compensation Director
Norma McKinney NM Personnel Director



Source of Request and Position Identification:

This position was reviewed as a result of a request from the department. Position number 019610 is located in the Communications Unit of the Technology Division of ESD. The unit is responsible for building, installing, and maintaining all central City telephone and data communications networks.

Scope of Review:

This review was conducted by Susie Hansen Farrell and Irene Ogunyemi, Classification Analysts assigned to Team 1. The report was written by Susie Hansen Farrell. The review of the subject position included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) dated February 11, 1998 and submitted for this review;
- ◆ Review/analysis of subject position information;
- ◆ Classification specifications for Administrative Specialist II, Accounting Technician II, Accounting Technician III, Accountant, Assistant Finance Analyst, and Management Systems Analyst;
- ◆ Review of the organizational chart affecting the subject position;
- ◆ Collaboration with other analysts;
- ◆ Position history records and related classification files;
- ◆ Position audit and follow-up;
- ◆ Interview with incumbent's supervisor.

Summary of Work:

The essential purpose of this position is to manage the telecommunications telephone billing system; budget tracking for the unit; revenue and expenditure tracking for special projects; maintain databases for SHAR codes, travel cards and the City telephone directory; and supervision of subordinates.

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.

Analysis:

This is a mixed-duty position and was compared to several class specs in order to find a suitable match.

Administrative Specialist II - This is the current title of the position. Positions in this class perform the full range of administrative support for high level management or specialized tasks in support of a special function or program. Work requires advanced knowledge of general office practices and procedures and comprehensive knowledge of department /program policies and procedures; and ability to solve special problems and make reliable decisions. In contrast, the position under review appears to have assumed a preponderance of accounting/financial functions; therefore, the



administrative support series is no longer the best match for this position and will not be explored further.

Accounting Technician II - This class performs the full range of accounting record maintenance activities of an assigned accounting area or set of records. All operations are performed independently according to department procedures. Positions perform multiple complex and responsible accounting support tasks, solve special problems, make reliable decisions, independently research and analyze facts and present findings upon which important or costly decisions could be made. Positions may train subordinates but do not lead or supervise. In contrast, the position under review is not responsible for "a set of records;" the responsibilities deal more with analysis and monitoring than with maintaining accounting records. Further, the position **does** supervise. Therefore, the position has greater responsibility than is reflected at this level, making this title unsuitable.

Accounting Technician III - This class has lead rather than full supervisory authority over subordinates. Positions in this class perform all accounting records maintenance operations and procedures pertaining to a complex set of accounts or records. They are distinguished by great independence of action, judgment exercised, complexity and financial impact of work, and department and City-wide visibility. While the level of independence, judgment exercised, complexity of work and financial impact are similar to the position under review, this position also has supervisory responsibilities. And again, the duties of this position are more related to financial analysis and tracking than maintaining accounting records. This title is not the best match for the position.

Accountant - Performs a variety of professional accounting functions according to generally accepted accounting practices. Knowledge of accounting practices, methods, laws, rules and ordinances is required to determine the most appropriate methods and procedures to apply and to ensure compliance. Among the duties listed in the PDQ are processing interfund cash transfers and year-end adjustments to correct accounts, developing accounting procedures related to project specifications and working with Accounting staff in ensuring these procedures meet the requirements of projects. These are functions which fit the Accountant class spec; however, they represent only about 20% of the duties. Therefore, this title is not the best match for the position.

Assistant Finance Analyst - Performs the less complex paraprofessional tasks to assist a Finance Analyst in budgetary and financial support functions, such as financial analysis, budget planning/management and control including developing/monitoring program budgets, authorizing and monitoring expenditures against the budget, reconciling expenditures to revenue and preparing financial status reports and recommending solutions to problems. The work requires judgment in allocating funds, developing budgets and explaining basis for decisions and proposals. The position under review is responsible for the telephone billing system (billing City departments for telephone services, analyzing bills received from vendors for discrepancies and correcting problems, settling billing disputes with customers); and for monitoring, tracking and analyzing the unit budget and budgets for special projects. The position

prepares monthly analytical reports outlining revenue shortfalls, over-expenditures, etc. and proposes solutions to these problems. The position works closely with a Manager



3 (who formerly did the unit budget work) and an Executive 2 (who formerly did the project budget work). The position is responsible for analyzing the data, locating discrepancies, and proposing solutions. Once approval is given, the position is responsible for implementing the change. These duties fit well within the class spec for Assistant Finance Analyst.

Management Systems Analyst - This is the title suggested by the department. This class provides advice and service to management on specific operational and administrative processing and reporting systems by analyzing data and preparing recommendations to implement new systems, procedures or organizational changes. They evaluate the effectiveness of operating procedures and devise the most efficient methods of accomplishing work in areas such as planning, policy development, manpower utilization, delegation of authority, etc. In other words, positions in this class are expected to analyze a specific way of doing business, research other methods, decide if another way is more appropriate, and make recommendations to management on changes that should be made. This class spec does not reflect the duties and/or responsibilities of the position under review nor does it accurately describe how the work is done. This position does not analyze a way of doing business for effectiveness and recommend that it be changed. It works within an established system and modifies procedures to fit specific situations.

Because of the mix of duties, the position could possibly fit into more than one of the above titles; however, certain things are clear.

- The position has assumed a different scope than is reflected in the title of Administrative Specialist II and no longer fits into the administrative support series.
- The duties of the position are focused almost entirely on financial and/or accounting functions (telephone billings, coordination of unit budget preparation, monitoring and tracking unit and project budgets, preparing monthly financial status reports). The above duties represent approximately 82% of the work currently performed.
- The position is expected to analyze data from spreadsheets, locate potential problems, and bring them to the attention of the supervisor or manager, with recommended solutions. The position is not expected to make decisions regarding the final solution to a problem; however, the position does implement the recommended solution.
- The position has supervisory responsibility for one permanent Administrative Specialist II position and up to three temporary positions.

Summary:

The majority of the duties of this position appear to match more closely with the Assistant Finance Analyst title than the other titles used for comparison. This title was intended for positions who work directly with a Finance Analyst, and this position does not. However, this position works closely with a Manager 3 and an Executive 2 who perform the financial functions for this particular unit, as the unit is not large enough to warrant a full-time Finance Analyst. Therefore, the intent of the class spec would not be compromised by allocating this position to the title of Assistant Finance Analyst.



Recommendation:

Because the majority of the duties of this position most closely match the class spec for Assistant Finance Analyst, it is recommended that the position be allocated to that title. As this is a new title effective July 8, 1997, and the effective date of this reclass is January 2, 1997, another title must be recommended for the period from 1/2/97 to 7/7/97 because the incumbent was performing duties at a higher level.

The report compares this position to the Accounting Technician III class, and states "While the level of independence, judgment exercised, complexity of work and financial impact are similar to the position under review, this position also has supervisory responsibilities." The position under review was not giving performance evaluations prior to this reclass because the title of the subordinate is the same as the position's current title. Therefore, the position was not performing all supervisory functions, but acting as lead. An Accounting Technician III is responsible for maintaining a set of accounting records as opposed to financial analysis and tracking; for this reason, the Accounting Technician III title was not the best match for the body of work. However, if the Assistant Finance Analyst title were not available, the Accounting Technician III title would have been the recommendation, as it was the second best fit for the body of work. Since the Accounting Technician III title is the best match outside the Assistant Finance Analyst title, it is recommended that this title be used to cover the period from 1/2/97 to 7/7/97.

Costing:

If implemented on the 1998 Second Quarter Ordinance, the maximum estimated cost of implementing this action would be \$6,281.16. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be \$7,033.60. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.

Addendum (Reconsideration #98-2411)

A Reconsideration Hearing was held on July 31, 1998 as requested by the department. Attending the Reconsideration were the members of the Reconsideration Board (Lidia Santiesteban, Classification/Compensation Director; Edie Jorgensen, Classification/Compensation Supervisor; and Kathy Steinmeyer, Policy Unit, Sr. Personnel Analyst); Irene Ogunyemi, Personnel Analyst representing Team 1; and Bill Schrier, ESD Telecommunications Director; Stan Woo, Voice Communications Director; Dean Arnold, Engineering Manager; Gina Hooks, incumbent's supervisor; and Precy Tugublimas, incumbent. The department said that the responsibilities had increased since the original informational interviews with the incumbent and the incumbent's supervisor, and the position should be classified as a Finance Analyst.

Since January, 1997, this position has steadily changed in scope and responsibility. The duties have decreased in the clerical/support capacity and increased at the financial analysis/accounting level. When the classification report was written, the position was working at the Assistant Finance Analyst level. Since that time, the



position has continued to assume more responsibility and now, according to information provided by the department, makes financial decisions independently and is no longer required to seek approval from management before implementing changes. Because of the continually changing focus of duties and responsibilities, the Reconsideration Board has assessed that the most appropriate classifications for this position would be Accounting Technician III from 1/1/97 to 7/7/97; Assistant Finance Analyst from 7/8/97 to 5/31/98; and Finance Analyst on 6/1/98.

Costing

Based on rates in effect when this report was written, if implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action would be \$19,263.31. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be \$18,715.71. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary..





CLASSIFICATION DETERMINATION REPORT

Date: Oct. 8, 1998 Report No.: 98-1684A

POSITION IDENTIFICATION
Department: Executive Services
Classification Title: Accounting Technician II
Ordinance Title: Accounting Technician II
Position Number: 010731
Bargaining Unit: 030 Current Salary: \$14.00 - \$15.66 (Range: 22.5B)

RECOMMENDED ACTION
Classification Title: Accounting Technician III
Ordinance Title: Accounting Technician III
Legislation Required: Yes
Bargaining Unit: 030 Recommended Salary: \$15.36 - \$17.22 (Range: 25.0B)
Remarks: Reclassification

INCUMBENT STATUS
Incumbent:
Current Standing: Accounting Technician II
Recommended Standing: Accounting Technician III
In recommended standing, incumbent status is: N/A
[X] Regular; [] Probationary; [] Temporary
Authority: Personnel Rule
[X] 2.3.100; [] 2.3.200; [] 2.3.300.
Remarks: Effective 1/27/98.

Recommended: Team A *JWS* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
Lidia Santiesteban *LS* Classification/Compensation Director
Norma McKinney *NM* Personnel Director



Source of Request and Position Identification:

This position was reviewed as a result of a departmental request. Position #010731 is located in the City Payroll Unit, Finance Division of the Executive Services Department. This work unit is responsible for maintaining the accuracy of the citywide payroll and pension processing functions.

Position History:

Detailed historical data of the position can be accessed via the Personnel Division's Records Unit.

Scope of Review:

This review was conducted by Class/Comp Team A, consisting of Susie Hansen Farrell and Irene Ogunyemi; and the report was written by Irene Ogunyemi. The review of the subject position included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) dated 1/27/98, submitted for this review;
- ◆ Informational interview with position incumbent;
- ◆ Team A's review/analysis of subject position information;
- ◆ Information from City Payroll Supervisor;
- ◆ Comparison to similar positions;
- ◆ Corroboration with other Class/Comp Analysts;
- ◆ Review of the organizational charts affecting the subject position;
- ◆ Position history records and related classification files.

Summary of Work:

The essential purpose of this position is to process manual warrants in support of the Citywide payroll processing function.

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.

Analysis:

For purposes of this review, classification specifications for Accountant and Accounting Technician series were reviewed and compared to the duties listed on the submitted PDQ. This report will address duties and responsibilities in the order listed on the submitted PDQ.

PDQ 50% Calculate taxes, retirement and miscellaneous deductions for all manual salary warrants requests and cancellations to correct employee's masterfile. Balance payroll output, research and reconcile discrepancies and coordinate rejected transactions corrections with City Personnel Records Office.....and other City department payroll offices.



These duties are found within the class specification for Accounting Technician II. An Accounting Technician II... *prepares payroll/personnel documents and updates files to ensure proper and accurate employee, salary, benefits information, i.e., out-of-class pay, salary rates, fringe benefits, vacations and deductions. Reconciles ledger transactions and discrepancies.* At the informational interview, the position incumbent explained the process required to reverse the action when there is an error in the system while calculating a pay check. *(The original pay check has to be cancelled, all deductions (taxes, etc.) processed manually and pay check reissued.)* While this process might appear complex, it is simplified by the availability of tables that give pre-calculated deductions for a given number. *The subject position is required to look up the appropriate rate and apply it to the formula to get the correct deductions.* The position incumbent showed us these various tables and affirmed that these tables are utilized when preparing manual warrants. If in fact these duties are complex, positions assigned to Accounting Tech II are expected *...to work under minimal guidance and perform multiple complex and responsible accounting support tasks.....*

PDQ 30% Process direct deposits. Verify general deductions, sick leave transfers and accumulator changes are processed accurately for manual warrants in accordance with federal, state and City policies and union contracts. Prepare journal entries for various cash transfers.

These duties fall within the class specification for Accounting Technician II. These positions... *ensure proper and accurate employee, salary, benefits information, i.e., out-of-class pay, salary rates, fringe benefits, vacations and deductions. Verify and balance all journal and ledger entries. Reconcile ledger transactions and discrepancies.* This work involves rapid turnaround time, can be stressful, and the volume is high because it is Citywide. This kind of work is expected of this class *...Assignments require handling complicated tasks where the cost of correcting errors would be substantial in either time or money.* And regarding the volume issue, in the context of Classification/Compensation, volume of work, in itself, is not an indication of increased responsibility, therefore, not classifiable or compensable.

PDQ 15% Provide customer service in the form of fielding phone inquiries regarding CSS, SFMS and ADP processing and procedures, federal, state and City policies, ordinances and guidelines, union agreements, employee benefits, garnishments, W-2s, etc.

These duties are also found within the class specification for Accounting Technician II. An Accounting Technician II... *performs multiple complex and responsible accounting support tasks, solving special problems, making reliable decisions, independently researching and analyzing facts, and presenting findings upon which important or costly decisions could be made. Positions in this class possess a knowledge of basic accounting/bookkeeping and departmental procedures and practices and work within those established procedures and methods.* Contacts are with the public, other agencies, other departments or departmental employees for exchanging and providing information.



PDQ 5% Research and analyze system problems and advise them of the cause. Report problems to the Management System Analyst with supporting documents.

These duties are found within the class specification for Accounting Technician III. *An Accounting Technician III...assists in the implementation of new accounting procedures and methods. Prepares special reports, summaries and statements. Performs other related duties of a comparable level/type as assigned.*

This comprehensive review revealed that the focus of the body of work of the subject position has changed from processing Savings Bonds to Citywide payroll and processing of manual warrants. The assessment also revealed that the preponderance of duties (95%) fall within the class spec for Accounting Technician II, the subject position's current title. The analysis also revealed that the subject position's duties and responsibilities are beyond the level of Accounting Technician I, but not at the level of Accounting Technician III.

To be at the level of Accounting Technician III,.....positions are expected to serve as lead workers over lower level accounting support positions and/or perform all accounting records maintenance operations and procedures pertaining to a complete set of accounts or accounting records. The summary section of the submitted PDQ states....*duties involve monitoring some of the work of two subordinates.....*The scope of this duty was not elaborated on at the informational interview, neither was it listed under the percentage of duties in the PDQ. However, it was clarified by the City Payroll Supervisor that the position under review distributes work to and reviews work of two Accounting Technicians for accuracy, and to insure that all policies and procedures established by payroll have been followed. According to the submitted PDQ, this duty is not a major function of the position under review. Serving as lead is the major function of positions assigned to Accounting Tech III, which distinguishes this class from the class of the position under review. Consequently, the majority of this position's work is not at this level.

Conversely, the class specification for Accountant (the title requested by the position incumbent) was reviewed, but found to be inappropriate to the level of work of the subject position as revealed in the above analysis. The focus of the class spec for the Accountant title is to *perform a variety of professional accounting functions, including auditing, monitoring, researching and recommending revisions to accounting procedures and operations. Positions assigned to this title may analyze and prepare cash flow forecasts and financial reports, audit and reconcile accounts in the general ledger, monitor and control accounting activities in the recording of financial transactions, i.e. accounts receivables, accounts payables, collections and fixed asset,* all performed according to generally accepted accounting practices. Knowledge of accounting practices, methods, laws, rules and ordinances is required to determine the most appropriate methods and procedures to apply and to ensure compliance. It was concluded that this title is not appropriate for the position under review, since its work does not fit the description of this class spec.



Recommendation:

As the class spec for Accounting Technician II still represents the majority of duties performed by position #010731, I recommend no change in its classification.

Costing:

The implementation of this action will result in no additional cost to the department.

ADDENDUM TO REPORT #98-1684 (Assignment Log #2494):

The incumbent and department appealed the Accounting Technician II allocation recommended on Classification Determination Report #98-1684. Both the department and position incumbent believe the position should be classified as an Accountant.

A reconsideration hearing was held on September 29, 1998. In attendance representing the Reconsideration Panel were Lidia Santiesteban-Class/Comp Director and John Pearson and Edie Jorgensen- Personnel Analyst Supervisors. The analyst who performed the initial review, Irene Ogunyemi, was unavailable and Jimmy Woo- Senior Personnel Analyst was her replacement. Representing the department were Carol Metcalf- Director, ESD Accounting Services, James Ernsdorf- Senior Accountant and Sandra Rossman-Pablo- the position incumbent.

Additional information provided to the panel at the hearing indicates the subject position serves as a lead to Citywide departmental payroll personnel by researching and resolving payroll problems, correcting the payroll master files, performing transfers in the payroll system, reconciling ADP, Summit and CSS payroll data and reconstructing individual history files. Accountant level responsibilities cited by the incumbent include, balancing the cash between the Treasurers Office and bank account, reconciling manual warrants on different accounts, balancing accounting records, and correcting individual records level.

Positions allocated to the Accountant classification perform professional accounting functions and tasks including auditing and reconciling accounts in the general ledger; reconciling analyzing and preparing cash flow forecasts; preparing financial reports; statements and schedules; and preparing journals and maintaining ledgers. The subject position's primary responsibilities do not entail the aforementioned functions as they are concerned more with providing assistance to payroll personnel on a Citywide basis in resolving payroll problems and ensuring the maintenance and updating of payroll accounting data and records. This position's role in providing guidance, explanation, research and analysis, problem resolution and answers to line department payroll representatives on a Citywide basis warrants consideration for reclassification to the Accounting Technician III class. The demands on this position, as well as availability to provide technical direction is representative of those positions allocated to the Accounting Technician III classification who serve as leadworkers over other accounting technician positions engaged in the maintenance and preparation of



accounting records and files and perform accounting records maintenance operations and procedures pertaining to a complex set of accounts or accounting records.

Recommendation:

Based on the additional information provided at the reconsideration hearing, it is recommended this position be reclassified to Accounting Technician III, effective January 27, 1998, the date the PDQ was signed.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action would be \$7,593.37 based on salary information in effect when this report was prepared. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be \$3,796.69. the calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: July 21, 1998 Report No.: 98-1723

POSITION IDENTIFICATION

Department: Executive Services
Classification Title: See Exhibit A
Ordinance Title: See Exhibit A
Position Number: See Exhibit A
Bargaining Unit: 030 Current Salary and Range: See Exhibit A

RECOMMENDED ACTION

Classification Title: Video Specialist II
Ordinance Title: Video Specialist II
Legislation Required: Yes
Bargaining Unit: 030 Recommended Salary: \$20.04 - \$23.35 (Range: 33.0A)
Remarks: See next page for pertinent allocation information

INCUMBENT STATUS

Incumbent: See Exhibit A
Current Standing: See Exhibit A
Recommended Standing: Video Specialist II
In recommended standing, incumbent status is: See Exhibit A
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *Supiso* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
Lidia Santiesteban *LS* Classification/Compensation Director
Norma McKinney *NM* Personnel Director



Source of Request and Position Identification:

These positions were reviewed as a result of a request from the department. The five positions under review are located in the Technology Division of ESD. The unit is responsible for operating the City's government access TV channel and providing video production services to City departments.

Scope of Review:

This review was conducted by Susie Hansen Farrell, Classification Analyst assigned to Team 1. The review of the subject positions included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) dated March 25, 1998 and submitted for this review;
- ◆ Review/analysis of subject positions' information;
- ◆ Old classification specifications for Video Specialist, Senior Video Specialist and Principal Video Production Specialist and revised classification specification for Video Specialist II;
- ◆ Review of the organizational chart affecting the subject positions;
- ◆ Position history records and related classification files.

Summary of Work:

The essential purpose of these positions is to lead and coordinate a variety of video production activities, including overseeing the broadcast of the City's government access cable channel; researching, writing and producing videos; setting up, maintaining and repairing video, sound and lighting equipment; overseeing and directing studio productions and live or taped shows; and other video responsibilities. They also provide video services to other City departments.

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.

Background:

In 1997, the City reorganized and expanded video services by relocating video positions from the Library and other City departments to the Executive Services Department. Although the five positions submitted for review have different titles, the department contends that the body of work is the same for all positions, and has submitted a new PDQ in order to resolve long-standing inequity issues and correct the inconsistency.

The five positions submitted for review are currently titled Principal Video Production Specialist (2) and Senior Video Specialist (3). In the Classification Project, this series was reviewed, and the titles of Video Production Specialist (and Senior) were changed to Video Specialist (and Senior), and the Principal class was eliminated. However, some of the positions were not changed via legislation and remain under the old titles (specifically, two Video Productions Specialist positions that are being underfilled with



unrelated titles). To further exacerbate the situation, the Principal title was resurrected in late 1992 as an emergency position without identifying what duties (if any) were being performed that were outside the Senior class. Due to the confusion resulting from all of the above, it was determined that clarification and revision of the structure and titling of this series was the most appropriate way to resolve the long-standing problems associated with this class. Thus, via related reports and recommendations, the class specification for Principal Video Production Specialist was updated, assigned a new schematic number, and the title was changed to Video Specialist II. The Senior Video Specialist title was abolished. The journey level has yet to be reviewed.

Analysis:

The PDQ states that, since the merger, staff now provide a much broader and more complex range of services. These positions manage the production process for video projects, including leading the production team; manage broadcast operations, including transmission of City programming to the cable company, developing broadcast schedules, and overseeing the broadcast equipment operation; and work with City departments to assess their video needs and develop video production opportunities. Positions supervise other video specialists or production teams. These duties match the class specification for Video Specialist II.

Recommendation:

As the positions under review have been assigned broader responsibility which includes Citywide functions, it is recommended that position numbers 024205, 025457, 008852, 017349 and 017250 be retitled/reclassified/reallocated to Video Specialist II according to the recommendations and effective dates identified on Exhibit A.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using rates in effect at the time this report was written, the maximum estimated cost of implementing this action would be \$87,907.87. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be \$36,798.64. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.



EXHIBIT A

July 13, 1998

Report #98-1723A

POSITION IDENTIFICATION	
Department:	Executive Services
Classification Title:	Video Production Specialist, Principal.
Ordinance Title:	Video Production Specialist, Principal
Position Number:	024205
Bargaining Unit:	030 Current Salary \$20.04 - \$23.35 Range: 33.0A
INCUMBENT STATUS	
Incumbent:	
Current Standing:	Video Production Specialist, Principal
Recommended Standing:	Video Specialist II
In recommended standing, incumbent status is:	
<input checked="" type="checkbox"/> Regular;	<input type="checkbox"/> Probationary: <input type="checkbox"/> Temporary.
Authority: Personnel Rule	
<input checked="" type="checkbox"/> 2.3.100;	<input type="checkbox"/> 2.3.200; <input type="checkbox"/> 2.3.300.
Remarks: Retitle effective 1/1/97. Seniority in the class is not affected by this action.	

POSITION IDENTIFICATION	
Department:	Executive Services
Classification Title:	Video Production Specialist, Principal.
Ordinance Title:	Video Production Specialist, Principal
Position Number:	025457
Bargaining Unit:	030 Current Salary \$20.04 - \$23.35 Range: 33.0A
INCUMBENT STATUS	
Incumbent:	
Current Standing:	Video Production Specialist, Principal
Recommended Standing:	Video Specialist II
In recommended standing, incumbent status is:	
<input checked="" type="checkbox"/> Regular;	<input type="checkbox"/> Probationary: <input type="checkbox"/> Temporary.
Authority: Personnel Rule	
<input checked="" type="checkbox"/> 2.3.100;	<input type="checkbox"/> 2.3.200; <input type="checkbox"/> 2.3.300.
Remarks: Retitle effective 1/1/97. Seniority in the class is not affected by this action.	



RECOMMENDED ACTION	
Classification Title:	Video Specialist II
Ordinance Title:	Video Specialist II
Legislation Required:	Yes
Bargaining Unit:	030 Recommended Salary: \$20.04 - \$23.35 Range: 33.0A

POSITION IDENTIFICATION	
Department:	Executive Services
Classification Title:	Video Specialist, Sr.
Ordinance Title:	Video Specialist, Sr.
Position Number:	008852
Bargaining Unit:	030 Current Salary \$ 18.55-\$21.67 Range: 31.0A

INCUMBENT STATUS	
Incumbent:	
Current Standing:	Video Specialist, Sr.
Recommended Standing:	Video Specialist II
In recommended standing, incumbent status is:	
<input checked="" type="checkbox"/> Regular;	<input type="checkbox"/> Probationary: <input type="checkbox"/> Temporary.
Authority: Personnel Rule	
<input type="checkbox"/> 2.3.100;	<input checked="" type="checkbox"/> 2.3.200; <input type="checkbox"/> 2.3.300.
Remarks: Reclassification effective 9/26/97	

POSITION IDENTIFICATION	
Department:	Executive Services
Classification Title:	Video Specialist, Sr.
Ordinance Title:	Video Specialist, Sr.
Position Number:	017349
Bargaining Unit:	030 Current Salary \$ 18.55-\$21.67 Range: 31.0A

INCUMBENT STATUS	
Incumbent:	
Current Standing:	Video Specialist, Sr.
Recommended Standing:	Video Specialist II
In recommended standing, incumbent status is:	
<input checked="" type="checkbox"/> Regular;	<input type="checkbox"/> Probationary: <input type="checkbox"/> Temporary
Authority: Personnel Rule	
<input type="checkbox"/> 2.3.100;	<input checked="" type="checkbox"/> 2.3.200; <input type="checkbox"/> 2.3.300.
Remarks: Reclassification effective 3/25/98	



POSITION IDENTIFICATION	
Department:	Executive Services
Classification Title:	Video Specialist, Sr.
Ordinance Title:	Video Specialist, Sr.
Position Number:	017250
Bargaining Unit:	030 Current Salary \$ 18.55-\$21.67 Range: 31.0A
INCUMBENT STATUS	
Incumbent:	
Current Standing:	Video Specialist, Sr.
Recommended Standing:	Video Production Specialist, Principal (1/1/93 to 10/12/93) Position number 017349
	Video Production Specialist, Principal (10/13/93 to 12/31/96) Position number 017250
Recommended Standing:	Video Specialist II (1/1/97) Position number 017250
In recommended standing, incumbent status is:	
<input checked="" type="checkbox"/> Regular;	<input type="checkbox"/> Probationary: <input type="checkbox"/> Temporary.
Authority: Personnel Rule	
Reclassification effective 1/1/93 (position number 017349)	<input checked="" type="checkbox"/> 2.3.200;
Reallocation effective 10/13/93 (position number 017250)	<input checked="" type="checkbox"/> 2.3.300;
Retitle effective 1/1/97 (Seniority is not affected by this action)	<input checked="" type="checkbox"/> 2.3.100.



CITY OF SEATTLE
EXECUTIVE SERVICES DEPARTMENT



CLASSIFICATION DETERMINATION REPORT

Date: 10/31/98 Report No.: 98-1869A

POSITION IDENTIFICATION

Department: Executive Services Department (ESD), City Budget Office
Classification Title: Administrative Specialist I
Ordinance Title: Administrative Specialist I
Position Number: 015082
Bargaining Unit: 030 Current Salary: \$13.47 - \$15.02 (Range: 20.5B)

RECOMMENDED ACTION

Classification Title: Administrative Specialist II
Ordinance Title: Administrative Specialist II
Legislation Required: Yes
Bargaining Unit: 030 Recommended Salary: \$14.49 - \$16.21 (Range: 22.5B)
Remarks Effective date of reallocation: March 26, 1998

INCUMBENT STATUS

Incumbent: N/A, vacant
Current Standing: N/A, vacant
Recommended Standing: N/A, vacant
In recommended standing, incumbent status is:
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks: Reconsideration #98-2571.

Recommended: Team 1 *DS* Classification/Compensation Analyst(s)

Approved: Edie Jorgensen Classification/Compensation Supervisor

OB Classification/Compensation Director

Norma McKinney *NM* Personnel Director



Source of Request and Position Identification:

This position was reviewed as a result of a request from the department. The position is located in the City Budget Office. The position is currently vacant.

Position History:

Detailed historical data of the position can be accessed via the Personnel Division's Records Unit.

Scope of Review:

This review was conducted by Carl Swanson, Classification Analyst assigned to Team 1. The review of the subject position included analysis of the following:

- ◆ the Position Description Questionnaire (PDQ) submitted for this review;
- ◆ Team 1's review/analysis of subject position's information;
- ◆ comparison to similar positions;
- ◆ review of the organization chart affecting the subject position;
- ◆ position's history records and related classification files.

Summary of Work:

The essential purpose of this position is to provide clerical support to four budget managers and their teams of analysts.

Duties include:

- providing scheduling support, scheduling meetings;
- participating in the production of the City's biennial budget document;
- using Access and Excel to create new formats for the CIP document;
- producing presentation materials using Excel and Powerpoint;
- serving as the fire safety officer; and
- providing back-up to other administrative staff for full office coverage .

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.



Analysis:

class concepts:

ADMINISTRATIVE SPECIALIST I

Positions in this class perform the full range of general administrative support duties and/or several specialized clerical tasks in support of a program. Representative duties at this level include establishing and maintaining logs, files, indexes and similar records systems; compiling and editing special reports; composing routine correspondence; checking the work of others for errors or omissions; verifying information to be included in documents or public record; gathering statistical information to be used for reports; and reviewing, evaluating and entering data into personal computer or terminal, creating or updating files.

ADMINISTRATIVE SPECIALIST II

Positions in this class perform the full range of administrative support functions for high level management or perform specialized tasks in support of a special function or program. These positions assign, review and evaluate the work of subordinate staff. Representative duties at the level include: preparing and reviewing standard and special reports; preparing program documents and inter-departmental forms; monitoring progress of departmental projects and workloads; preparing and maintaining spreadsheets and similar computer support activities; training and advising employees on office procedures and in performing specialized tasks.

This position continues to meet the class concept for Administrative Specialist I by performing the full range of administrative support functions for a *program*. It does not meet the concept for Administrative Specialist II because it is not performing the full range of administrative support functions for *high level management, or leading the work of subordinate staff*.

Recommendation:

Based on the duties and responsibilities assigned, we recommend that this position continue to be allocated to Administrative Specialist I.

Costing

The implementation of this action will result in no additional costs to the department.

Addendum

A reconsideration meeting was held October 30, 1998. The reconsideration panel consisted of Edie Jorgensen, Class/Comp Supervisor, John Pearson, Class/Comp Supervisor and Curt Funk, Senior Personnel Analyst. The City Budget Office was represented by Anne Fisk-Zuniga, CBO Director, Jim Echert, Budget Manager and Rosalie Melendez-Daigre, Personnel Specialist.



Ms. Fisk-Zuniga presented additional information regarding the subject position's responsibility in the production of the CIP budget book, in extracting and formatting data from the ACCESS database, in tracking Statements of Legislative Intent (SLIs), and in making sure that the Mayor's letters are responded to in a timely manner.

The panel agreed that the additional information provided supports reclassification to Administrative Specialist II. This position is performing specialized tasks in support of the City budget programs. Accordingly, position #015082 is reallocated to Administrative Specialist II, effective March 26, 1998, the requested date.

Costing

If implemented on the 1998 Fourth Quarter Ordinance, using rates in effect as of November 1, 1998, the maximum estimated cost of implementing this action would be \$1448.09. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be \$2896.19. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.



Source of Request and Position Identification:

This position was reviewed as a result of a request from the department. Position #017584 is located in the Warrants Issuance Unit of the Finance Division of ESD. The unit is responsible for controlling, accounting for, and distributing City warrants. This includes all City payroll warrants, retiree warrants, and vendor payments.

Scope of Review:

This review was conducted by Susie Farrell, Classification Analyst assigned to Team 1. The review of the subject position included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) dated July 6, 1998 and submitted for this review;
- ◆ Review/analysis of subject position information;
- ◆ Classification specifications for Accounting Technician Supervisor and Accountant;
- ◆ Review of the organizational chart affecting the subject position;
- ◆ Position history records and related classification files.

Summary of Work:

The essential purpose of this position is to manage all aspects of the City-wide warrant distribution system. The position performs the following:

- supervises two accounting technicians, including assigning and checking work, training, and giving performance evaluations;
- researches SFMS for accounts payable information, prints and mails checks to vendors (\$7 - \$12 million per day), and balances SFMS with inventory sheet;
- distributes City payroll warrants to departments for distribution to employees, pulling checks with liens or garnishments and issuing manual warrants where needed;
- balances manual warrant report daily;
- prints and distributes City pension checks;
- processes "stop-payment" and cancellation requests City-wide;
- researches bank reports to identify outstanding warrants, conducts follow-up and reports discrepancies;
- assigns control numbers for wire transfers, enters information into SFMS, produces vouchers for signature, tracks and reports activity;
- processes checks for outside agencies involved in payroll deductions (health care providers, unions, etc.); answers questions and solves problems regarding discrepancies in amounts paid;
- provides budget recommendations for the unit's postage requirements, equipment and supplies;
- explains/defends work to state auditors.

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.



Analysis:

Class specifications for Accounting Technician Supervisor and Accountant were reviewed and compared for this analysis.

Accounting Technician Supervisor: The main focus of this position is to supervise a group of subordinates engaged in the maintenance and preparation of accounting records and accounts. The duties include overseeing, monitoring, reviewing and evaluating the work of subordinates; training employees; resolving personnel problems; and investigating and researching problem accounts to identify problems and/or ensure accuracy.

The position under review supervises an Accounting Technician I and an Accounting Technician II. While the duties outlined in the class spec are included in the position's responsibilities, these duties take only 25% of the time. The remainder of the time is spent logging, balancing, and reconciling the many records needed to track the warrants produced and sent out by this unit. Therefore, this title is not the best match for the position.

Accountant: This position performs and coordinates the maintenance and production of accounting records and reports and ensures compliance with established accounting procedures and practices. Positions prepare financial reports and schedules; monitor and control accounting activities in the recording of financial transactions; review and verify accounting transactions and make appropriate corrections and adjustments; and coordinate and monitor the work of accounting support personnel to ensure proper work operations.

The position under review has responsibility for a number of accounting records to track warrants, including pension, accounts payable, manual and mechanical warrants, wire transfers, outside agency payments, and stop-payments. For each type of warrant, a record must be kept in which the warrant number is logged, the amount calculated and the total reconciled with SFMS or other supporting information. These records must also be balanced against each other. Any discrepancies in the totals are researched by this position and correcting entries and adjustments are made. Reports are prepared for management. This position has sole responsibility for these financial records and reports; most of the duties of the position represent City-wide responsibility.

This position receives reports from banking institutions which must be reviewed daily. Outstanding warrants must be researched and amounts verified, and parties are contacted when the amounts are unusually large. This position also prepares reports for the Investments Unit, which are used to determine available funds for investment opportunities.

This position has recently been asked to help plan a new system for printing payroll checks in-house. This position will be responsible for that work, which is currently being done by an outside vendor. This position will be writing procedures, ordering new equipment (check printers) and hiring and training additional staff, as well as ensuring that the printing portion of new system operates smoothly so that payroll checks are printed in a timely manner.



This position and the unit it supervises are highly visible in that they are responsible for the distribution of large amounts of money to pay City employees, vendors, and others involved in City business under strict deadlines. A high degree of confidentiality is required due to the sensitive nature of the warrants being processed. The combination of inflexible deadlines, high visibility and strict quality standards create a high pressure environment, making the management of this unit highly stressful. At times, customers may become hostile or angry if there is a delay or problem related to receiving their warrants.

Due to the high level of responsibility, high visibility, high consequence of error, amount and type of financial records and reports maintained by this position (in relation to the relatively small amount of time spent on supervision), this position is more accurately represented by the Accountant title.

Recommendation:

Based on the duties and responsibilities of this position, I recommend that the position be reclassified to the title of Accountant effective July 6, 1998, the date the PDQ was signed.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action, using rates in effect at the time this report was written, would be \$2,701.49. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be \$1,800.99. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: September 10, 1998 Report No.: 98-2253

POSITION DESCRIPTION

Department: Executive Services Department, Finance Division
Classification Title: Administrative Specialist II
Ordinance Title: Administrative Specialist II
Position Number: 010735
Bargaining Unit: 030 Current Salary: \$14.00-\$15.66 (Range: 22.5B)

RECOMMENDED ACTION

Classification Title: Accounting Technician II
Ordinance Title: Accounting Technician II
Legislation Required: Yes
Bargaining Unit: 030 Recommended Salary: \$14.00-\$15.66 (Range: 22.5B)
Remarks: Reclassification effective 7/19/94

INCUMBENT STATUS

Incumbent:
Current Standing: Administrative Specialist II
Recommended Standing: Accounting Technician II
In recommended standing, incumbent status is:
[X] Regular; [] Probationary; [] Temporary.
Authority: Personnel Rule
[X] 2.3.100; [] 2.3.200; [] 2.3.300.
Remarks:

Recommended: Team 1 *shf* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
Lidia Santiesteban *LS* Classification/Compensation Director
Norma McKinley *NM* Personnel Director



Source of Request and Position Identification:

This position was reviewed as a result of a request from the department. Position number 010735 is located in the Remittance Processing Unit of the Executive Services Department. The Unit is responsible for processing and recording mailed payments for the utilities, Seattle Municipal Court, and Animal Control. The Unit also handles inquiries related to the payments processed.

Scope of Review:

This review was conducted by Susie H. Farrell, Classification Analyst assigned to Team 1. The review of the subject position included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) dated June 17, 1998 and submitted for this review;
- ◆ Review/analysis of subject position information;
- ◆ Classification specifications for Administrative Specialist II and Accounting Technician II;
- ◆ Review of the organizational chart affecting the subject position;
- ◆ Position history records and related classification files.

Summary of Work:

The essential purpose of this position is to provide customer service to City departments, banks, and citizens by researching accounts and answering questions about payment discrepancies, errors, and adjustments.

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.

Analysis:

The incumbent is requesting that the position under review be reclassified from Administrative Specialist II to Accounting Technician II. She states that the body of work is not accurately represented by the Administrative Specialist title. The duties have basically remained the same since the incumbent was hired.

The bulk of the work of this position deals with payments received from customers to pay utility bills, court actions, pet licenses and fees, and other City services. This position researches accounts in response to customer requests and makes adjustments, corrects errors, and resolves discrepancies in order to rectify customer accounts. The position receives adjustment information from the bank and uses SFMS entries to correct accounts, and also researches payments, retrieves copies of checks or other payment documentation, provides stop payments on customer accounts, and tracks and files payments corrected. Finally, the position reconciles, reviews, verifies and corrects entries processed by others to ensure accuracy.



A comparison was made of the Administrative Specialist II and Accounting Technician II class specs.

The Administrative Specialist II provides the full range of administrative support functions for high level management or performs specialized tasks in support of a special function or program. Work requires knowledge of general office practices and department policies/procedures.

The Accounting Technician II performs the full range of accounting records maintenance activities of an assigned accounting area or set of records. Positions reconcile, review, verify and correct entries prepared by others. Work requires a knowledge of basic accounting and departmental procedures and practices.

The work done by this position is clearly accounting related rather than administrative and belongs in the Accounting Technician class. The Accounting Technician II class spec most accurately describes the duties of this position.

Recommendation:

The duties of this position are clearly accounting related; therefore, the position should be reclassified to Accounting Technician II effective July 19, 1994, the date the incumbent was hired into the position.

Costing:

As the salary for the two titles is the same, this action will result in no cost to the department.





CLASSIFICATION DETERMINATION REPORT

Date: 12/11/98 Report No.: 98-2327A

POSITION IDENTIFICATION
Department: Executive Services Department (ESD), Fleet Services Division
Classification Title: Administrative Support Assistant
Ordinance Title: Administrative Support Assistant - BU
Position Number: 016597
Bargaining Unit: 035 Current Salary: \$12.23 - \$13.72 (Range: 18.0B)

RECOMMENDED ACTION
Classification Title: Administrative Specialist I - BU
Ordinance Title: Administrative Specialist I - BU
Legislation Required: Yes
Bargaining Unit: 035 Recommended Salary: \$13.47 - \$15.02 (Range: 20.5B)
Remarks: Reference reconsideration panel determination: 98-2637.

INCUMBENT STATUS
Incumbent:
Current Standing: Administrative Support Assistant
Recommended Standing: Administrative Specialist I
In recommended standing, incumbent status is:
[X] Regular; [] Probationary; [] Temporary.
Authority: Personnel Rule
[] 2.3.100; [X] 2.3.200; [] 2.3.300.
Remarks:

Recommended: Team 1 *CDS* Classification/Compensation Analyst(s)

Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor

QCB Classification/Compensation Director

Norma McKinney *NM* Personnel Director



Source of Request and Position Identification:

This position was reviewed as a result of a request from the incumbent. The position is located in the Municipal Building Garage.

Position History:

Detailed historical data of the position can be accessed via the Personnel Division's Records Unit. The position was created effective January 1, 1978, via Ordinance #107000. The incumbent has been in the position since September 3, 1996.

Scope of Review:

This review was conducted by Carl Swanson, Classification Analyst assigned to Team 1. The review of the subject position included analysis of the following:

- ◆ the Position Description Questionnaire (PDQ) submitted for this review;
- ◆ Team 1's review/analysis of subject position's information;
- ◆ comparison to similar positions;
- ◆ review of the organization chart affecting the subject position;
- ◆ position's history records and related classification files.

Summary of Work:

The essential purpose of this position is to coordinate and track the availability of 50 motor pool vehicles.

Duties include:

- receiving telephone and in-person vehicle reservations and reserving vehicles, directing customers to the reserved parking area, taking parking reservations and issuing parking permits(42.5%);
- balancing and recording fuel transactions from the previous day, post-balancing fuel sheets in EMS, preparing monthly summaries of fueling and motor pool activities (15%), **NOTE:** these fueling related duties are ending at the end of 1998;
- checking and correcting disputed, illegible or faulty information regarding vehicle transactions (20%);
- responding to various inquiries regarding maintenance, rentals, accidents, towing, lockouts, and emergency situations (5%);
- responding to inquiries regarding vehicle information, records and location (5%);
- taking, preparing and distributing records of official proceedings; and
- processing and distributing City identification badges (7.5%).

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.



Analysis:**class concepts:****ADMINISTRATIVE SUPPORT ASSISTANT**

Positions in this class perform a variety of routine office support functions such as typing, data entry, receptionist, posting information, proofing documents, completing simple calculations, compiling reports, filing and retrieving documents and operating a variety of office equipment. Positions in this class, under continuing supervision, usually perform a variety of routine clerical support tasks or a single specialized task in support of a program activity.

ADMINISTRATIVE SPECIALIST I

Positions in this class perform the full range of general administrative support duties and/or several specialized clerical tasks in support of a program. Representative duties at this level include establishing and maintaining logs, files, indexes and similar records systems; compiling and editing special reports; composing routine correspondence; checking the work of others for errors or omissions; verifying information to be included in documents or public record; gathering statistical information to be used for reports; and reviewing, evaluating and entering data into personal computer or terminal, creating or updating files.

This position continues to meet the class concept for Administrative Support Assistant by performing a variety of routine office support functions. It does not meet the concept for Administrative Specialist I because it is not performing the full range of administrative support duties expected at that level. Rather, the duties are routine and recurring, and little changed in level, since the PDQ was last updated in 1987. At that time the duties broke out as follows:

- calculating repair order totals and extending the charges into the correct column, posting repair information to a card file, and contacting customers when repairs were complete (50%);
- answering phone inquiries, taking reservations for motor pool cars, signing out vehicles and preparing pencil diagrams of vehicles' location in the garage (35%);
- totaling and posting the fuel log sheet (5%);
- making laminated City photo identification cards (5%); and
- submitting all month end materials and reports (5%).

Recommendation:

Based on the duties and responsibilities assigned, we recommend that this position continue to be allocated to Administrative Support Assistant.

Costing

The implementation of this action will result in no additional costs to the department.



ADDENDUM:

A reconsideration meeting was held on December 9, 1998. The panel consisted of Dean Barnes, Employee Services Director, Edie Jorgensen, Class/Comp Supervisor, and John Pearson, Class/Comp Supervisor. Candace Goins, position incumbent, Sheldon Loo, the supervisor of the position, and George Moore, Automotive Technician, appeared to present additional/clarifying information regarding this position.

The panel determined that, although none of the individual duties are beyond the Administrative Support Assistant level, the overall variety of duties, combined with the level of independence, was sufficient to raise the position to the Administrative Specialist I level.

Costing

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action would be \$4745.86. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be \$3163.90. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: 11/10/98

Report No.: 98-2415

POSITION IDENTIFICATION

Department: Executive Services Department (ESD), Contracting Services Division
Classification Title: Accountant, Principal
Ordinance Title: Accountant, Principal
Position Number: 010670
Bargaining Unit: 030 **Current Salary:** \$21.67 - \$24.26 (Range: 34.0B)

RECOMMENDED ACTION

Classification Title: Accounting Technician Supervisor
Ordinance Title: Accounting Technician Supervisor - BU
Legislation Required: Yes
Bargaining Unit: 035 **Recommended Salary:** \$16.57 - \$18.55 (Range: 27.0B)
Remarks: Reclassification effective August 21, 1998 through December 31, 1998.

INCUMBENT STATUS

Incumbent:
Current Standing: Accountant, Principal
Recommended Standing: Accounting Technician Supervisor
In recommended standing, incumbent status is:
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *EDS* Classification/Compensation Analyst(s)

Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor

REB Classification/Compensation Director

Norma McKinney *NM* Personnel Director



Source of Request and Position Identification:

This position was reviewed as a result of a request from the incumbent. The position is located in the Contracting Services Division, Vendor Relations.

Position History:

Detailed historical data of the position can be accessed via the Personnel Division's Records Unit. This position is to be abrogated in the 1999 budget.

Scope of Review:

This review was conducted by Carl Swanson, Classification Analyst assigned to Team 1, with the participation of Gail Thompson, Classification Analyst assigned to Team 2. The review of the subject position included analysis of the following:

- ◆ the Position Description Questionnaire (PDQ) submitted for this review;
- ◆ the review/analysis of the subject position's information by a Senior Personnel Analyst, and four Personnel Analysts ;
- ◆ a desk audit interview with the incumbent conducted by Carl Swanson and Gail Thompson;
- ◆ an informational interview with the supervisor conducted by Carl Swanson and Gail Thompson;
- ◆ comparison to similar positions;
- ◆ review of the organization chart affecting the subject position;
- ◆ position's history records and related classification files.

Summary of Work:

The essential purpose of this position is to supervise the Vendor Relations Unit. Duties include:

- providing technical direction to an Accounting Technician II and an Accounting Technician I in the vendor *qualifications* process (15%);
- providing technical direction to an Accounting Technician II and an Accounting Technician I in the vendor *payment* process (15%);
- resolving disputes involving either contractual compliance or customer satisfaction (15%);
- responding to public disclosure requests (20%);
- making recommendations, providing technical advice and developing procedures and processes (10%);
- overall supervision of the Vendor Relations Unit, including the budget (\$250,000), the work plan and the training plan (15%);
- other related duties, including conducting research and analysis on special projects, round out the position(10%).



Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.

Analysis:

class concepts:

ACCOUNTANT, PRINCIPAL

Positions in this class oversee the operations, personnel, procedures and practices of a major accounting function, i.e. payroll, accounts receivable, accounts payable, and general ledger, for a department or utility. Supervises accounting/financial personnel to ensure accounting functions adhere to generally accepted accounting principles, practices and methods. Supervises the development, modification and implementation of accounting procedures, financial controls, research and financial analyses, and the production and interpretation of financial reports.

ACCOUNTING TECHNICIAN SUPERVISOR

Positions in this class supervise subordinates responsible for the performance of accounting functions and tasks associated with the maintenance and updating of accounting and accounts records. Monitors the work and performance of subordinates to ensure the accurate and timely processing of work according to established accounting methods and procedures.

As noted above, this position was reviewed by four Personnel Analysts and a Senior Personnel Analyst. This group concluded that this position meets the class concept for Accounting Technician Supervisor. The work of supervising two Accounting Technician positions in vendor qualification, payment and contract compliance functions is fundamentally different work than described in the Principal Accountant class specification. The subject position does not oversee the operations, personnel, procedures and practices of a *major accounting function for a department or utility*. Rather, the focus of this position is the daily supervision of technical accounting staff and transactions.

The incumbent provided supplemental material, and a desk audit interview was conducted to gain further information as to the nature of the work. All this information supported the classification of this position as Accounting Technician Supervisor.

To more clearly see how the subject position now meets the Accounting Technician Supervisor, rather than the Accountant, Principal class concept, it is helpful to look at what this position was, when it was last reviewed as an Accountant, Principal. In August of 1987, a position description was submitted for this position, then in the Comptroller's Office, which described the following duties:

- planning and organizing the work activities of the staff (12%);



- assisting the manager in the development of and changes to the City's chart of accounts, in the review of and changes to fund and/or org structures, fund consolidations or elimination (10%);
- preparing financial statements and directing staff in preparing and compiling the annual report fund files including worksheets that substantiate the Comprehensive Annual Financial Report (CAFR) (30%);
- providing technical guidance to staff accountants in their general ledger control and monitoring activities on the City's governmental, internal service, pension trust, and enterprise funds (15%);
- directing and guiding staff accountants in ensuring that annual budget, supplemental appropriations and budget transfers in their assigned funds are properly recorded and accounted for (5%);
- preparing and maintaining appropriate accounting procedures (8%); and
- other related duties which round out the position.

Clearly the duties of this position, when it was in the Comptroller's Office, are more reflective of Accountant, Principal, kind and level of work, than the current duties in Contracting Services. The work then had a Citywide scope (CAFR), as well as greater breadth and depth of responsibility.

A review of positions currently classified as Accountant, Principal, and as Accounting Technician Supervisor, confirms that the subject position does not compare well with positions classified as Accountant, Principal. It has duties of a lesser breadth, depth and scope. Conversely, it does compare closely to positions classified as Accounting Technician Supervisor.

Recommendation:

Based on the duties and responsibilities assigned, we recommend that this position be reclassified to Accounting Technician Supervisor, effective August 21, 1998.

Costing

The implementation of this action will result in no additional costs to the department.





CLASSIFICATION DETERMINATION REPORT

Date: October 21, 1998 Report No.: 98-2465

POSITION IDENTIFICATION
Department: Executive Services/Accounting Services Division
Classification Title: Accounting Technician III
Ordinance Title: Accounting Technician III
Position Number: 015879
Bargaining Unit: 030 Current Salary: \$15.36 - \$17.22 (Range: 25.0B)

RECOMMENDED ACTION
Classification Title: Accountant
Ordinance Title: Accountant
Legislation Required: Yes
Bargaining Unit: 034 Recommended Salary: \$16.57 - \$19.29 (Range: N/A)
Remarks: Reclassification, effective June 25, 1998

INCUMBENT STATUS
Incumbent:
Current Standing: Accounting Technician III
Recommended Standing: Accountant
In recommended standing, incumbent status is:
[X] Regular; [] Probationary; [] Temporary.
Authority: Personnel Rule
[] 2.3.100; [x] 2.3.200; [] 2.3.300.
Remarks: Gradual accretion of duties.

Recommended: Team 1 *lyo* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
Lidia Santiesteban *LS* Classification/Compensation Director
Norma McKinney *NM* Personnel Director



Source of Request and Position Identification:

This position was reviewed as a result of a departmental request to reclassify the position to the title of Accountant. This is to enable the position to provide the additional accounting support needed to carry out accounting functions for the City's General fund. Position # 015879 is located in the Accounting Services Division of the Executive Services Department. This work unit is responsible for, among other various functions, providing technical support in accounting, budget analysis and monitoring to the City's departments.

Position History:

Detailed historical data of the position can be accessed via the Personnel Division's Records Unit. -

Scope of Review:

This review was conducted by Irene Ogunyemi, Class/Comp Analyst assigned to Team 1. The review of the subject position included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) dated June 25, 1998, and submitted for this review;
- ◆ Review/analysis of subject position information;
- ◆ Class Specifications for the Accounting Technician class series and the Accountant class.
- ◆ Comparison to similar positions;
- ◆ Review of the organizational charts affecting the subject position;
- ◆ Position history records and related classification files.

Summary of Work:

The essential purpose of this position is to perform fund accounting functions for the City's multi-department General Fund; perform broad analytical review of the City's year-end financial reports; monitor and reconcile Citywide operating transfers; and maintain the integrity of financial information that goes into the City's Comprehensive Annual Financial Report (CAFR).

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.

Analysis:

To appropriately classify the position under review, the class specifications for the Accounting Technician series and the Accountant class were reviewed and compared to the duties outlined in the submitted PDQ.

The review revealed that positions in the Accounting Technician series perform tasks which require knowledge of the accounting system and program requirements to



determine how to process documents and balance accounts. Positions at the Accounting Technician III level, (current classification for the position under review), are the advanced level of the series. Positions at this level engage in the maintenance and preparation of accounting records and files and perform all maintenance operations and procedures pertaining to a complex set of accounts. They may coordinate, prepare and review reports; research and resolve difficult billing inquiries; assist in the implementation of new procedures; and coordinate and lead in the maintenance of control records.

Conversely, positions in the Accountant class perform a variety of professional accounting functions and tasks for a City department or utility. They ensure compliance with established accounting procedures and practices as they perform and coordinate the maintenance and production of accounting reports and records. The knowledge required of Accountants and the application of advanced analysis and creative solutions in performing the work distinguishes them from Accounting Technicians.

This comparison, therefore, revealed that the duties of the position under review (which according to departmental management were gradually accreted), clearly fit the Accountant class spec more closely than that of its current classification. Position # 015879 is responsible for a variety of fund accounting functions for the City's General Fund, including broad analytical review of the City's accounting reports for consistency, comparability, proper account classification and program categories. It is also responsible for the production of the CAFR, maintenance of the master documents and preparation of CAFR production schedules, as well as balancing Citywide cash. The subject position designs various Excel spreadsheets for accounting analysis and manipulating data; identifies discrepancies/problems; determines cause(s), coordinates with other City departments in resolving discrepancies, and processes the appropriate SFMS entries to correct discrepancies. These duties are consistent with the work performed by positions allocated to Accountant classification as opposed to those in the Accounting Technician III classification who are responsible for the day-to-day maintenance of accounting records.

Recommendation:

Since the duties and responsibilities assigned to the subject position are consistent with the Accountant classification, it is recommended that position # 015879 be reclassified to the title of Accountant, effective June 25, 1998, the date that the position incumbent signed the PDQ.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect at the time this report was written, the maximum estimated cost of implementing this action would be \$4,319.95. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be \$5,037.91. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: November 24, 1998 Report No.: 98-2472

POSITION IDENTIFICATION

Department: Executive Services
Classification Title: Administrative Staff Assistant
Ordinance Title: Administrative Staff Assistant
Position Number: 010911
Bargaining Unit: 030 Current Salary: \$18.14 - \$21.16 (Range: 29.5A)

RECOMMENDED ACTION

Classification Title: Administrative Staff Analyst
Ordinance Title: Administrative Staff Analyst
Legislation Required: Yes
Bargaining Unit: 030 Recommended Salary: \$20.74-\$24.17 (Range: 33.0A)
Remarks: Reclassification effective January 1, 1997

INCUMBENT STATUS

Incumbent:
Current Standing: Administrative Staff Assistant
Recommended Standing: Administrative Staff Analyst
In recommended standing, incumbent status is:
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Susie Farrell *[Signature]* Classification/Compensation Analyst
Approved: Edie Jorgensen *[Signature]* Classification/Compensation Supervisor
[Signature] Classification/Compensation Director
Norma McKinney *[Signature]* Personnel Director



Source of Request and Position Identification:

This position was reviewed as a result of a request from the department. Position number 010911 is located in the Records and Information Management Unit and supervises the unit's activities. The unit is responsible for planning and managing the uses and changes of office space and communications; and managing central services such as mail service, office supplies, and records management.

Scope of Review:

This review was conducted by Susie Farrell, Classification Analyst assigned to Team 1. The review of the position included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) dated May 21, 1998 and submitted for this review;
- ◆ Review/analysis of subject position information;
- ◆ Classification specifications for Administrative Staff Assistant and Administrative Staff Analyst;
- ◆ Review of the organizational chart affecting the subject position;
- ◆ Position history records and related classification files.

Summary of Work:

This position has a varied range of responsibilities that support administrative functions and ongoing office operations for the Personnel Division of the Executive Services Department. The position is responsible for space planning and facilities projects for the division; managing the division's telecommunications services; administering the Records Management program and supervising support staff; and representing the department on a number of citywide focus and advisory groups.

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.

Analysis:

This position was allocated to the title of Administrative Specialist III as a result of the classification project (effective 1/2/91). The incumbent filed an appeal with the Civil Service Commission and the final determination was Administrative Staff Assistant. The department contends that, since that time, the position has assumed additional responsibilities in project management for space planning, telecommunications, and central office service operations. Also, in 1997 the position's supervisor was abrogated; the position now reports directly to the Employee Services Administrator.

Class Specifications for Administrative Staff Assistant and Administrative Staff Analyst were compared for this review.

Administrative Staff Assistant: Positions in this class serve as staff assistant to a small section or unit or to departmental management, and perform general administrative



functions. Positions conduct research and data collection for special assignments, participate in various personnel-related activities, and coordinate special programs or projects. They also coordinate and prepare the unit's budget.

Administrative Staff Analyst: Positions in this class provide general administrative and analytical support to a small department or a large unit of a department. Positions research and analyze a variety of operational or administrative issues or problems, assist in personnel matters, serve as liaison with other sections and divisions, monitor contracts, and coordinate budget preparation.

Both of these class specs describe fairly general bodies of work that include many facets of administrative support work such as research and data collection for special assignments, participation in personnel-related activities, coordination of special programs, and budget work. One major distinction is the Administrative Staff Assistant (AS Assistant) provides support to *a small section or unit* or to departmental management, while the Administrative Staff Analyst (AS Analyst) provides support to *a small department or a large unit* of a department. The AS Analyst specification also includes contract monitoring and serving as liaison with other sections and divisions.

As the position under review does serve as administrative support, both of the above class specs could describe the work. It must be determined which is the best match. The following are considerations to that end:

- Since the merger of 1997 which created the Executive Services Department, the Personnel Department has become the Personnel Division and fits the definition of a large unit of a department.
- This position has taken on a large share of the facilities management function since the merger. Space planning is a part of that function, which involves researching and analyzing administrative issues and anticipating ensuing problems (for example, what staff must be moved to accommodate a change; where they will move; how the space will be reallocated to fit the remaining staff, what personal issues could be anticipated and how they could be resolved).
- The position manages telecommunications for the division and acts as liaison with ESD Telephone services (Technology Division); serves as contact for other City departments on issues of records management and retention; and serves on a number of committees as representative from ESD and Personnel.

As shown above, the position serves as administrative support for a large unit (division) of a department. It acts as liaison with a number of interdepartmental units and also for other City departments. The position analyzes administrative problems and recommends solutions to management. These duties match the class specification for Administrative Staff Analyst.

Recommendation:

Because the duties and responsibilities of this position are more accurately described in the class spec for Administrative staff Analyst, I recommend this position be allocated to that class effective 1/1/97, the date of the merger of the Personnel Department with Finance and DAS.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using rates in effect on November 1, 1998, the maximum estimated cost of implementing this action would be \$21,733.59. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be \$7,325.66. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.



CITY OF SEATTLE
EXECUTIVE SERVICES
DEPARTMENT

CLASSIFICATION DETERMINATION REPORT

Date: December 11, 1998

Report No.: 98-2478

POSITION IDENTIFICATION

Department: Executive Services/Finance Division
Classification Title: Senior Parking Meter Collector
Ordinance Title: Parking Meter Collector, Senior
Position Number: 020817
Bargaining Unit: 030 Current Salary: \$13.72 - \$15.90 (Range: 22.0A)

RECOMMENDED ACTION

Classification Title: Supervising Parking Meter Collector
Ordinance Title: Parking Meter Collector, Supervising
Legislation Required: Yes
Bargaining Unit: 030 Recommended Salary: \$15.29 - \$17.82 (Range: 25.0A)
Remarks: Reclassification, effective July 1997.

INCUMBENT STATUS

Incumbent:
Current Standing: Senior Parking Meter Collector
Recommended Standing: Supervising Parking Meter Collector
In recommended standing, incumbent status is:
[X] Regular; [] Probationary; [] Temporary.
Authority: Personnel Rule
[] 2.3.100; [X] 2.3.200; [] 2.3.300.
Remarks: Gradual accretion.

Recommended: Irene Ogunyemi *ijo* Classification/Compensation Analyst
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
RJB Classification/Compensation Director
Norma McKinney *NM* Personnel Director



Source of Request and Position Identification:

This position was reviewed as a result of a departmental request. Position # 020817 is located in the Parking Meter Collection Unit, Finance Division of the Executive Services Department. This work unit is responsible for collecting, safeguarding, recording, and reporting parking meter coin for the City of Seattle. The unit is also responsible for inspecting meters for possible damage and reporting findings to Parking Meter Repair shop.

Position History:

Detailed historical data of the position can be accessed via the Personnel Division's Records Unit.

Scope of Review:

This review was conducted by Irene Ogunyemi, Class/Comp Analyst assigned to Team 1. The review of the subject position included analysis of the following:

- ◆ Position Description Questionnaire (PDQ) dated 9/10/98, and submitted for this review;
- ◆ Informational interview with position's manager and Sr. Parking Meter Collector (PMC);
- ◆ Team 1's review/analysis of subject position information;
- ◆ Comparison to class specification for Supervising PMC # 4004007;
- ◆ Review of salary report #98-2477;
- ◆ Review of the organizational charts affecting the subject position;
- ◆ Position history records and related classification files.

Summary of Work:

The essential purpose of this position is to supervise the work activities of the Parking Meter Collection unit; schedule work; hire, train, and evaluate staff; report collected parking meter coins; deposit coins and record collection weights; and safeguard keys and equipment.

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.

Analysis:

Management contends that since the reorganization of the Finance Division in 1997, the position under review has been performing duties beyond its classification. Some of these duties were performed by the former PMC Supervisor position. It was reported that the former PMC Supervisor position spent its time (100%) in the office doing supervisory and administrative tasks. These duties have now been distributed between the two current Sr. PMC and the Treasury Production Manager positions. The



department further states that the PMC Supervisor classification is inappropriate for the work the position under review is currently performing. Therefore, the department is requesting the Class/Comp unit create a new classification, "Parking Meter Collection Crew Chief" and reclassify position # 020817 from Sr. PMC to this new title. In the context of City Classification, occupations in which workers perform jobs which require special manual skill, such as carpenters, electricians, plumbers, mechanics and repairers; and with "lead" role over more than one unit, have work levels up to Crew Chief in their respective classifications. The work of PMC does not fall into this category. Therefore, the Crew Chief title is inappropriate for this class.

To better understand the business needs of the unit and the duties of the senior PMC, an informational interview and position audit were conducted with the subject position's unit manager and a senior PMC respectively. The interview and the position audit revealed that the position under review is expected to perform field work 50% of its time, supervisory duties and responsibilities 30% of its time, and administrative duties 20% of its time. Consequently, based on the information gathered and the submitted PDQ, I wrote the class spec that reflects the duties the department expects this position to perform.

Again, in the context of classification, the title "supervisor" is applied to positions that supervise 100% of the time; and "supervising" is applied to positions that are working supervisors. Since the position under review spends 30% (at most 40%) of its time on supervisory duties, the latter title is applicable to its classification. Thus, the class spec was titled "Supervising" PMC. And the duties and responsibilities as outlined in the submitted PDQ for the position under review meets the full intent of the aforementioned class specification.

Recommendation:

Consequently, based on the above analysis, I recommend that the subject position be reclassified to Supervising PMC effective July 1997, the date incumbent assumed the duties.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, the maximum estimated cost of implementing this action would be **\$4,563.32**. This figure includes any current and retroactive (*if applicable*) cost for this action. The ongoing annual cost for this action would be **\$3,042.22**. The calculations are based on the difference between the top step of the current and the recommended salary ranges and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: October 29, 1998 **Report No.:** 98-2510

POSITION IDENTIFICATION
Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 010579
Bargaining Unit: 130 **Current Salary and Range:** \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION
Classification Title: Exempt
Ordinance Title: Strategic Advisor 1, Exempt
Legislation Required: Yes
Bargaining Unit: 140 **Recommended Salary:** \$21.33 - \$28.79 (No Range)
Remarks: Resignation effective March 28, 1998

INCUMBENT STATUS
Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *ijo* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
Lidia Santiesteban *LS* Classification/Compensation Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). CBO is a newly created office responsible for preparing, reviewing and securing adoption of the City's annual budget and Capital Improvements Projects (CIP). This position is responsible for analyzing the financial, budget, and policy issues related to one or more small to medium-sized departments and directly assisting the CIP manager with the compilation, analysis, and production of the CIP. The position under review is also responsible for acting as the primary liaison between the Budget Director and City departments on all financial matters of departments.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, the Strategic Planning Office (SPO) and CBO. With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst (PMA), the CBO requested the position be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive financial issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality) and the duties have not changed, the CBO also requested that the positions continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 375 points, placing the position in the Pay Zone 1. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Limited/0	Med/75	Limited/0	Med/50	Limited/0

Recommendation:

Since this position was exempt from classified service (per SMC 4.13) in the Policy & Management Analyst title, we recommend that it continues to be exempt. We also recommend that this position be designated to the title of Strategic Advisor 1, Exempt, based on the duties and responsibilities outlined on the submitted MPDQ. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created CBO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, there is a cost savings to the department of **\$23,782.02**. The ongoing annual savings for this action is **\$12,972.01**. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).





CLASSIFICATION DETERMINATION REPORT

Date: October 29, 1998

Report No.: 98-2511

POSITION IDENTIFICATION

Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 022355
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 1, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$21.33 - \$28.79 (No Range)
Remarks: Redesignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *ijp* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
Lidia Santiesteban *LS* Classification/Compensation Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). The CBO is a newly created office responsible for preparing, reviewing and securing adoption of the City's annual budget and Capital Improvements Projects (CIP). This position is responsible for analyzing the financial, budget, and policy issues related to one or more small to medium-sized departments and directly assisting the CIP manager with the compilation, analysis, and production of the CIP. The position under review is also responsible for acting as the primary liaison between the Budget Director and City departments on all financial matters of departments.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, the Strategic Planning Office (SPO) and the CBO. With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst(s) (PMA), the CBO requested the position be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive financial issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality) and the duties have not changed, the CBO also requested that the positions continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 375 points, placing the position in the Pay Zone 1. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Limited/0	Med/75	Limited/0	Med/50	Limited/0

Recommendation:

Since this position was exempt from classified service (per SMC 4.13) in the Policy & Management Analyst title, we recommend that it continues to be exempt. We also recommend that this position be designated to the title of Strategic Advisor 1, Exempt, based on the duties and responsibilities outlined on the submitted MPDQ. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created CBO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, there is a cost savings to the department of **\$23,782.02**. The ongoing annual savings for this action is **\$12,972.01**. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).





CLASSIFICATION DETERMINATION REPORT

Date: November 4, 1998 Report No.: 98-2513

POSITION IDENTIFICATION
Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 017165
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION
Classification Title: Exempt
Ordinance Title: Strategic Advisor 2, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$25.20 - \$34.02 (No Range)
Remarks: Redesignation effective March 28, 1998

INCUMBENT STATUS
Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is. N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *ijp* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
WLB Classification/Compensation Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). CBO is a newly created office responsible for preparing, reviewing and securing adoption of the City's annual budget and capital improvement projects. Position # 017165 is located in the CBO, and it is responsible for analyzing the financial, budget, and policy issues related to large or complex departments, programs or issues. The said position is also responsible for communicating the findings to City departments, Mayor, Deputy Mayors and the City Council.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, the Strategic Planning Office (SPO) and the CBO. With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst (PMA), the CBO requested the position be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality) and the duties have not changed, the CBO also requested that the position continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 525 points, placing the position in the Pay Zone 2. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Limited/0	Med/75	Limited/0	Hi/100	Hi/100

Recommendation:

Since this position met the exemption criteria (per SMC 4.13); and based on its duties and responsibilities, we recommend that this position continue to be exempt; and be designated to the title of Strategic Advisor 2, Exempt. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created CBO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, there is a cost savings to the department of \$3,480.30. The ongoing annual savings for this action is \$1,898.34. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).





CLASSIFICATION DETERMINATION REPORT

Date: November 4, 1998 Report No.: 98-2514

POSITION IDENTIFICATION

Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 016899
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 2, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$25.20 - \$34.02 (No Range)
Remarks: Redesignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *ijy* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
WEB Classification/Compensation Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). CBO is a newly created office responsible for preparing, reviewing and securing adoption of the City's annual budget and capital improvement projects. Position # 016899 is located in the CBO, and it is responsible for analyzing the financial, budget, and policy issues related to large or complex departments, programs or issues. The position is also responsible for communicating the findings to City departments, Mayor, Deputy Mayors and the City Council.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, the Strategic Planning Office (SPO) and the CBO. With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst (PMA), the CBO requested the position be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality) and the duties have not changed, the CBO also requested that the position continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 525 points, placing the position in the Pay Zone 2. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Limited/0	Med/75	Limited/0	Hi/100	Hi/100

Recommendation:

Since this position met the exemption criteria (per SMC 4.13); and based on its duties and responsibilities, we recommend that this position continue to be exempt; and be designated to the title of Strategic Advisor 2, Exempt. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created CBO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, there is a cost savings to the department of **\$2,985.84**. The ongoing annual savings for this action is **\$1,898.34**. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).





CLASSIFICATION DETERMINATION REPORT

Date: November 4, 1998 Report No.: 98-2515

POSITION IDENTIFICATION

Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 017167
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 2, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$25.20 - \$34.02 (No Range)
Remarks: Redesignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *isp* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
REB Classification/Compensation Director
Norma McKinnon *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). CBO is a newly created office responsible for preparing, reviewing and securing adoption of the City's annual budget and capital improvement projects. Position # 017167 is located in the CBO, and it is responsible for analyzing the financial, budget, and policy issues related to large or complex departments, programs or issues. The position is also responsible for communicating the findings to City departments, Mayor, Deputy Mayors and the City Council.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, the Strategic Planning Office (SPO) and the CBO. With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst (PMA), the CBO requested the position be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality) and the duties have not changed, the CBO also requested that the position continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 525 points, placing the position in the Pay Zone 2. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Limited/0	Med/75	Limited/0	Hi/100	Hi/100

Recommendation:

Since this position met the exemption criteria (per SMC 4.13); and based on its duties and responsibilities, we recommend that this position continue to be exempt; and be designated to the title of Strategic Advisor 2, Exempt. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created CBO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, there is a cost savings to the department of \$2,985.84. The ongoing annual savings for this action is \$1,898.34. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).





CLASSIFICATION DETERMINATION REPORT

Date: Nov. 10, 1998

Report No.: 98-2516

POSITION IDENTIFICATION

Department: Executive Services - City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 015091
Bargaining Unit: 130 Current Salary: \$21.50 - \$30.39

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 3, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$29.08 - \$39.26
Remarks: Redesignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.

Recommended: Team 1 *SW* Class/Comp Analyst
Approved: Edie Jorgensen *EJ* Class/Comp Supervisor
Norma McKinney *NM* Class/Comp Director
Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the City Budget Office (CBO). Position number 015091 is located in CBO and works with issues involving utilities, the environment, and technology. This position was formerly located in the Office of Management and Planning (OMP) and was part of the OMP broad band pay plan implemented in 1997. OMP has been reorganized, resulting in the creation of CBO and the Strategic Planning Office, and the broad band no longer exists. Therefore, it has been requested that this position be included in the Manager/Strategic Advisor Program.

ANALYSIS AND RECOMMENDATION

Scope of Review: The position was reviewed in 1997 for inclusion in the Managers and Strategic Advisors Programs. After a Reconsideration, the original ratings were revised, and that revised rating is being used for this report. The point factor analysis yielded 850 points in the Strategic Advisor point factor system resulting in its allocation to Zone 3. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
High/150	High/350	Limited/0	High/150	High/50	Medium/50	High/100

The department has requested that this position be exempt from Civil Service. The position works on sensitive financial issues requiring a high degree of individual professional accountability, responsiveness and confidentiality. The position is responsible for development and management of core policy and budget issues which will affect the operation of the City's operating departments and citizens over the next several years. As CBO is viewed and used by the Mayor as an extension of the Mayor's Office, the work of these positions necessitates the highest level of confidentiality. The position will explore a full spectrum of policy options in draft format, and a breach of confidentiality could result in damage in the ability to execute the Mayor's goals for the City. These positions will be accountable in an advisory capacity directly to high level CBO Executive management, City Council and the Mayor on the development of policy and budget issues.

Recommendation: Based on the duties and responsibilities, we recommend that this position be designated as a Strategic Advisor 3, effective March 28, 1998. We also recommend that this position be exempt from Civil Service.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action, using rates effective November 1, 1998, would be \$16,866.05 if the position were paid at midpoint. This figure includes any current and retroactive



cost for this action. The ongoing annual cost for this action would be \$9,199.66 (assuming the position was paid at midpoint). The calculations are based on the differences between the top step of the current salary range and the mid-point of the recommended salary range and include statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: November 4, 1998 **Report No.:** 98-2517

POSITION IDENTIFICATION

Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 015077
Bargaining Unit: 130 **Current Salary and Range:** \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 2, Exempt
Legislation Required: Yes
Bargaining Unit: 140 **Recommended Salary:** \$25.20 - \$34.02 (No Range)
Remarks: Resignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *ijp* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
[Signature] Classification/Compensation Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). CBO is a newly created office responsible for preparing, reviewing and securing adoption of the City's annual budget and capital improvement projects. Position # 015077 is located in the CBO, and it is responsible for analyzing the financial, budget, and policy issues related to large or complex departments, programs or issues. The position is also responsible for communicating the findings to City departments, Mayor, Deputy Mayors and the City Council.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, the Strategic Planning Office (SPO) and the CBO. With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst (PMA), the CBO requested the position be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality) and the duties have not changed, the CBO also requested that the position continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 525 points, placing the position in the Pay Zone 2. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Limited/0	Med/75	Limited/0	Hi/100	Hi/100

Recommendation:

Since this position met the exemption criteria (per SMC 4.13); and based on its duties and responsibilities, we recommend that this position continue to be exempt; and be designated to the title of Strategic Advisor 2, Exempt. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created CBO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, there is a cost savings to the department of **\$2,985.84**. The ongoing annual savings for this action is **\$1,898.34**. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).





CLASSIFICATION DETERMINATION REPORT

Date: November 4, 1998 Report No.: 98-2518

POSITION IDENTIFICATION

Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 020825
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 2, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$25.20 - \$34.02 (No Range)
Remarks: Resignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *ijy* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
QEB Classification/Compensation Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). CBO is a newly created office responsible for preparing, reviewing and securing adoption of the City's annual budget and capital improvement projects. Position # 020825 is located in the CBO, and it is responsible for analyzing the financial, budget, and policy issues related to large or complex departments, programs or issues. The position is also responsible for communicating the findings to City departments, Mayor, Deputy Mayors and the City Council.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, the Strategic Planning Office (SPO) and the CBO. With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst (PMA), the CBO requested the position be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality) and the duties have not changed, the CBO also requested that the position continue to be exempt in its allocation.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 525 points, placing the position in the Pay Zone 2. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Limited/0	Med/75	Limited/0	Hi/100	Hi/100

Recommendation:

Since this position met the exemption criteria (per SMC 4.13); and based on its duties and responsibilities, we recommend that this position continue to be exempt; and be designated to the title of Strategic Advisor 2, Exempt. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created CBO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, there is a cost savings to the department of **\$2,985.84**. The ongoing annual savings for this action is **\$1,898.34**. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).





CLASSIFICATION DETERMINATION REPORT

Date: November 24, 1998 Report No.: 98-2519

POSITION IDENTIFICATION

Department: Executive Services Department- City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 022054
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39
(Range: N/A)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 2, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$25.20 - \$34.02 (Range: N/A)
Remarks: Redesignation effective 3/28/98.

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *ADS* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EB* Classification/Compensation Supervisor
----- *EB* Classification/Compensation Director
Norma McKinney *AM* Personnel Director



Source of request

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO).

Background Information

In 1998, the Office of Management and Planning (OMP) was reorganized. As a result of that action, two offices were created: the City Budget Office (CBO) and the Strategic Planning Office (SPO). With the demise of OMP, the Policy and Management Analyst (PMA) broad band pay program, implemented in 1997, is no longer in effect. The CBO has requested that this position be reviewed for inclusion in the Strategic Advisor/Manager program. The PMAs are currently exempt from civil service rules, due to the fact that they work on sensitive financial issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality. The CBO has requested that the positions continue to be exempt in their new designations.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 525 points, placing these positions in Pay Zone 2. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Low/0	Med/75	Low/0	High/100	High/100

It is recommended this position continue to be Civil Service exempt. According to material submitted by CBO, this position works on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness and confidentiality. This position is responsible for the development and management of core policy and budget issues which will affect the operation of the City's operating departments and the public. CBO top management asserts that the CBO is viewed and used as an extension of the Mayor's Office. Therefore, the work of this position necessitates the highest level of confidentiality and accountability. With this confidentiality, a full spectrum of policy options may be explored in draft format in various forms not yet ready for public viewing. A breach of confidentiality regarding issues, discussions, proposals, and/or concepts could result in damaging the ability to execute the Mayor's goals for the City. Additionally, these positions will be, at various times, accountable in an advisory capacity directly to high level CBO executive management, City Council members and the Mayor on the development of policy and budget issues.



Based on the duties and responsibilities, we recommend that this position be designated as Strategic Advisor 2, Exempt, effective March 28, 1998, the date the CBO was created.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using rates in effect November 1, 1998, there is a cost savings to the department of \$34.80. The ongoing annual savings would be \$41.76. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). CBO is a newly created office responsible for assisting the Mayor and City Council in the development of budget programs which carry out Executive and Legislative goals; developing the biennial City budget and capital improvement plan consistent with the Comprehensive Plan and adopted goals and policies; monitoring budgetary processes and expenditure levels of projects which meet goals delineated in the plan; and coordinating and reviewing budgetary accountability for meeting performance objectives established by departments. This position is responsible for analyzing economic, financial and policy issues associated with high profile programs or projects on behalf of the City and making recommendations to the City Budget Director, the Director of the Strategic Planning Office and the Mayor. This position presents and defends the Mayor's Proposed Budget before the City Council; represents the City Budget Office in meetings with other City departments; serve as lead staff for the most analytical projects involving multiple City departments focusing particularly on issues of Citywide significance with large financial ramifications. The position will present and defend the Executive's position on complex and sometimes controversial issues.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created: the Strategic Planning Office (SPO) and the City Budget Office (CBO). With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst(s) (PMA), the CBO requested the position(s) be reviewed for possible inclusion into the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive financial issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality), the CBO also requested that the positions continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 525 points, placing the position in the Pay Zone 2. The points for each dimension are listed below:



Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Low/0	Med/75	Low/0	High/100	High/100

It is recommended this position continue to be exempt from civil service rules. It works on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness and confidentiality. This position is responsible for the development and management of core policy planning issues which will affect the operation of the City's operating departments and all of our citizens over the next several years. As CBO is viewed and used by the Mayor as an extension of the Mayor's Office, the work of this position necessitates the highest level of confidentiality and accountability. With this confidentiality, a full spectrum of policy options may be explored in draft format in various forms not yet ready for public viewing. A breach of confidential issues, discussions, proposals, and/or concepts could result in great damage in the ability to execute the Mayor's goals for the City. Additionally, this position will be, at various times, accountable in an advisory capacity directly to high level CBO Executive management, City Council and the Mayor on the development of these policy issues.

Based on the duties and responsibilities, we recommend that this position be designated as a Strategic Advisor 2, Exempt, effective March 28, 1998, the date the CBO was created.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using rates in effect as of November 1, 1998, there is a cost savings to the department of \$1,581.95. The ongoing annual savings would be \$1,898.34. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: November 4, 1998 Report No.: 98-2521

POSITION IDENTIFICATION
Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 015629
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION
Classification Title: Exempt
Ordinance Title: Strategic Advisor 2, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$25.20 - \$34.02 (No Range)
Remarks: Redesignation effective March 28, 1998

INCUMBENT STATUS
Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *ijo* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
DEB Classification/Compensation Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). CBO is a newly created office responsible for preparing, reviewing and securing adoption of the City's annual budget and capital improvement projects. Position # 015629 is located in the CBO, and it is responsible for analyzing the financial, budget, and policy issues related to large or complex departments, programs or issues. The position is also responsible for communicating the findings to City departments, Mayor, Deputy Mayors and the City Council.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, the Strategic Planning Office (SPO) and the CBO. With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst (PMA), the CBO requested the position be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality) and the duties have not changed, the CBO also requested that the position continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 525 points, placing the position in the Pay Zone 2. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Limited/0	Med/75	Limited/0	Hi/100	Hi/100

Recommendation:

Since this position met the exemption criteria (per SMC 4.13); and based on its duties and responsibilities, we recommend that this position continue to be exempt; and be designated to the title of Strategic Advisor 2, Exempt. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created CBO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, there is a cost savings to the department of **\$2,985.84**. The ongoing annual savings for this action is **\$1,898.34**. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).





CLASSIFICATION DETERMINATION REPORT

Date: November 4, 1998 Report No.: 98-2522

POSITION IDENTIFICATION

Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 020498
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 2, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$25.20 - \$34.02 (No Range)
Remarks: Resignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *ijo* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
MB Classification/Compensation Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). CBO is a newly created office responsible for preparing, reviewing and securing adoption of the City's annual budget and capital improvement projects. Position # 020498 is located in the CBO, and it is responsible for analyzing the financial, budget, and policy issues related to large or complex departments, programs or issues. The position is also responsible for communicating the findings to City departments, Mayor, Deputy Mayors and the City Council.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, the Strategic Planning Office (SPO) and the CBO. With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst (PMA), the CBO requested the position be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality) and the duties have not changed, the CBO also requested that the position continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 525 points, placing the position in the Pay Zone 2. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Limited/0	Med/75	Limited/0	Hi/100	Hi/100

Recommendation:

Since this position met the exemption criteria (per SMC 4.13); and based on its duties and responsibilities, we recommend that this position continue to be exempt; and be designated to the title of Strategic Advisor 2, Exempt. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created CBO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, there is a cost savings to the department of **\$2,985.84**. The ongoing annual savings for this action is **\$1,898.34**. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).





CLASSIFICATION DETERMINATION REPORT

Date: November 4, 1998 Report No.: 98-2523

POSITION IDENTIFICATION
Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 018167
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION
Classification Title: Exempt
Ordinance Title: Strategic Advisor 2, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$25.20 - \$34.02 (No Range)
Remarks: Redesignation effective March 28, 1998

INCUMBENT STATUS
Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 ijp Classification/Compensation Analyst(s)
Approved: Edie Jorgensen EJ Classification/Compensation Supervisor
WJB Classification/Compensation Director
Norma McKinney AM Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). CBO is a newly created office responsible for preparing, reviewing and securing adoption of the City's annual budget and capital improvement projects. Position # 018167 is located in the CBO, and it is responsible for analyzing the financial, budget, and policy issues related to large or complex departments, programs or issues. The position is also responsible for communicating the findings to City departments, Mayor, Deputy Mayors and the City Council.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, the Strategic Planning Office (SPO) and the CBO. With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst (PMA), the CBO requested the position be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality) and the duties have not changed, the CBO also requested that the position continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 525 points, placing the position in the Pay Zone 2. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Limited/0	Med/75	Limited/0	Hi/100	Hi/100

Recommendation:

Since this position met the exemption criteria (per SMC 4.13); and based on its duties and responsibilities, we recommend that this position continue to be exempt; and be designated to the title of Strategic Advisor 2, Exempt. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created CBO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, there is a cost savings to the department of \$2,985.84. The ongoing annual savings for this action is \$1,898.34. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).





CLASSIFICATION DETERMINATION REPORT

Date: October 30, 1998 Report No.: 98-2524

POSITION IDENTIFICATION

Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 021399
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 3, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$29.08 - \$39.26 (No Range)
Remarks: Redesignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *lyo* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
Lidia Santiesteban *LS* Classification/Compensation Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). CBO is a newly created office responsible for preparing, reviewing and securing adoption of the City's annual budget and capital improvements projects. The Utilities & Transportation section of this office is responsible for the analysis of utility and transportation budget, financial and policy issues. This position is one of the five Team lead positions reporting to the City Budget Director. It is responsible for directing the work of subordinate staff and managing the related budget and policy issues on behalf of the City.

Background information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, the Strategic Planning Office (SPO) and the CBO. With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst (PMA), the CBO requested the position be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive financial issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality) and the duties have not changed, the CBO also requested that the positions continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 900 points, placing the position in the Pay Zone 3. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Hi/150	Hi/350	Limited/0	Hi/150	Hi/50	Hi/100	Hi/100

Recommendation:

Since this position was exempt from classified service (per SMC 4.13) in the Policy & Management Analyst title, we recommend that it continues to be exempt. We also recommend that this position be designated to the title of Strategic Advisor 3, Exempt, based on the duties and responsibilities outlined on the submitted MPDQ. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created CBO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, the maximum estimated cost of implementing this action would be **\$16,866.05**. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be **\$9,199.66**. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).





CLASSIFICATION DETERMINATION REPORT

Date: October 30, 1998

Report No.: 98-2525

POSITION IDENTIFICATION

Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 010441
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 3, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$29.08 - \$39.26 (No Range)
Remarks: Redesignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *ijp* Classification/Compensation Analyst(s)
Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor
Lidia Santiesteban *LS* Classification/Compensation Director
Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). The CBO is a newly created office responsible for preparing, reviewing and securing adoption of the City's annual budget and capital improvements projects. This position is responsible for all expenditure forecasting for the City and for balancing the Mayor's proposed budget. In addition, the position under review also serves as expert witness in interest arbitration settings when the City is negotiating contracts with Labor Unions.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, the Strategic Planning Office (SPO) and the CBO. With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst (PMA), the CBO requested the position be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive financial issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality) and the duties have not changed, the CBO also requested that the positions continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 800 points, placing the position in the Pay Zone 3. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Hi/350	Limited/0	Hi/150	Med/25	Hi/100	Hi/100

Recommendation:

Since this position was exempt from classified service (per SMC 4.13) in the Policy & Management Analyst title, we recommend that it continues to be exempt. We also recommend that this position be designated to the title of Strategic Advisor 3, Exempt, based on the duties and responsibilities outlined on the submitted MPDQ. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created CBO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, the maximum estimated cost of implementing this action would be **\$16,866.05**. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be **\$9,199.66**. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).





CLASSIFICATION DETERMINATION REPORT

Date: Nov. 10, 1998 Report No.: 98-2539

POSITION IDENTIFICATION

Department: Executive Services - City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 010424
Bargaining Unit: 130 Current Salary: \$21.50 - \$30.39

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 3, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$29.08 - \$39.26
Remarks: Redesignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.

Recommended: Team 1 SM Class/Comp Analyst
Approved: Edie Jorgensen EB Class/Comp Supervisor
Norma McKinney AKB Class/Comp Director
Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the City Budget Office. Position number 010424 is located in CBO and, as the City Budget Manager, will manage the overall process that develops the General Fund operating budget for the City. This position was formerly located in the Office of Management and Planning (OMP) and was part of the OMP broad band pay plan implemented in 1997. OMP has been reorganized, resulting in the creation of CBO and the Strategic Planning Office, and the broad band no longer exists. Therefore, it has been requested that this position be included in the Manager/Strategic Advisor Program.

ANALYSIS AND RECOMMENDATION

Scope of Review: The position was reviewed in 1997 for inclusion in the Managers and Strategic Advisors Programs. After a Reconsideration, the original ratings were revised, and that revised rating is being used for this report. The point factor analysis yielded 850 points in the Strategic Advisor point factor system resulting in its allocation to Zone 3. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
High/150	High/350	Limited/0	High/150	High/50	Medium/50	High/100

The department has requested that this position be exempt from Civil Service. The position works on sensitive financial issues requiring a high degree of individual professional accountability, responsiveness and confidentiality. The position is responsible for development and management of core policy and budget issues which will affect the operation of the City's operating departments and citizens over the next several years. As the City Budget Office is viewed and used by the Mayor as an extension of the Mayor's Office, the work of these positions necessitates the highest level of confidentiality. The position will explore a full spectrum of policy options in draft format, and a breach of confidentiality could result in damage in the ability to execute the Mayor's goals for the City. These positions will be accountable in an advisory capacity directly to high level CBO Executive management, City Council and the Mayor on the development of policy and budget issues.

Recommendation: Based on the duties and responsibilities, and because the position meets the exemption criteria, we recommend that this position be designated as a Strategic Advisor 3, Exempt, effective March 28, 1998.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action, using rates effective November 1, 1998, would be \$16,866.05 if the position were paid at midpoint. This figure includes any current and retroactive cost for this action. The ongoing annual cost for this action would be \$9,199.66



(assuming the position was paid at midpoint). The calculations are based on the differences between the top step of the current salary range and the mid-point of the recommended salary range and include statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: Nov. 10, 1998

Report No.: 98-2540

POSITION IDENTIFICATION

Department: Executive Services - City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 015087
Bargaining Unit: 130 Current Salary: \$21.50 - \$30.39

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 3, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$29.08 - \$39.26
Remarks: Resignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.

Recommended: Team 1 *SW* Class/Comp Analyst
Approved: Edie Jorgensen *EJ* Class/Comp Supervisor
Norma McKinney *NM* Class/Comp Director
Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the City Budget Office (CBO). Position number 015087 is located in CBO and is responsible for forecasting the City's revenues, assessing and formulating City revenue and fiscal policies, and assessing the economic and fiscal implications of the City's major policies and projects. This position was formerly located in the Office of Management and Planning (OMP) and was part of the OMP broad band pay plan implemented in 1997. OMP has been reorganized, resulting in the creation of CBO and the Strategic Planning Office, and that broad band no longer exists. Therefore, it has been requested that this position be included in the Manager/Strategic Advisor Program.

ANALYSIS AND RECOMMENDATION

Scope of Review: The position was reviewed in 1997 for inclusion in the Managers and Strategic Advisors Programs. After a Reconsideration, the original ratings were revised, and that revised rating is being used for this report. The point factor analysis yielded 850 points in the Strategic Advisor point factor system resulting in its allocation to Zone 3. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
High/150	High/350	Limited/0	High/150	High/50	Medium/50	High/100

The department has requested that this position be exempt from Civil Service. The position works on sensitive financial issues requiring a high degree of individual professional accountability and responsiveness. The position is responsible for development and management of core policy and budget issues which will affect the operation of the City's operating departments and citizens over the next several years. As the City Budget Office is viewed and used by the Mayor as an extension of the Mayor's Office, the work of this position necessitates the highest level of confidentiality. The position will explore a full spectrum of policy options in draft format, and a breach of confidentiality could result in damage in the ability to execute the Mayor's goals for the City. This position will be accountable in an advisory capacity directly to high level CBO Executive management, City Council and the Mayor on the development of policy and budget issues.

Recommendation: Based on the duties and responsibilities, and because the position meets the exemption criteria, we recommend that this position be designated as a Strategic Advisor 3, Exempt, effective March 28, 1998.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action, using rates effective November 1, 1998, would be \$16,866.05 if the position were paid at midpoint. This figure includes any current and retroactive



cost for this action. The ongoing annual cost for this action would be \$9,199.66 (assuming the position was paid at midpoint). The calculations are based on the differences between the top step of the current salary range and the mid-point of the recommended salary range and include statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: Nov. 10, 1998

Report No.: 98-2541

POSITION IDENTIFICATION

Department: Executive Services - City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 018170
Bargaining Unit: 130 Current Salary: \$21.50 - \$30.39

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 3, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$29.08 - \$39.26
Remarks: Redesignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.

Recommended: Team 1 *Shif* Class/Comp Analyst
Approved: Edie Jorgensen *EJ* Class/Comp Supervisor
Norma McKinney *NM* Class/Comp Director
Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the City Budget Office (CBO). Position number 018170 is located in CBO and is responsible for submission and implementation of the City's Capital Improvement Program, coordinating the compilation of fiscal notes and legislation, and providing budget policy guidance to City policy makers. This position was formerly located in the Office of Management and Planning (OMP) and was part of the OMP broad band pay plan implemented in 1997. OMP has been reorganized, resulting in the creation of the City Budget Office and the Strategic Planning Office, and that broad band no longer exists. Therefore, it has been requested that this position be included in the Manager/Strategic Advisor Program.

ANALYSIS AND RECOMMENDATION

Scope of Review: The position was reviewed in 1997 for inclusion in the Managers and Strategic Advisors Programs. After a Reconsideration, the original ratings were revised, and that revised rating is being used for this report. The point factor analysis yielded 850 points in the Strategic Advisor point factor system resulting in its allocation to Zone 3. The points for each dimension are listed below.

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
High/150	High/350	Limited/0	High/150	High/50	Medium/50	High/100

The department has requested that this position be exempt from Civil Service. The position works on sensitive financial issues requiring a high degree of individual professional accountability and responsiveness. The position is responsible for development and management of core policy and budget issues which will affect the operation of the City's operating departments and citizens over the next several years. As the City Budget Office is viewed and used by the Mayor as an extension of the Mayor's Office, the work of this position necessitates the highest level of confidentiality. The position will explore a full spectrum of policy options in draft format, and a breach of confidentiality could result in damage in the ability to execute the Mayor's goals for the City. This position will be accountable in an advisory capacity directly to high level CBO Executive management, City Council and the Mayor on the development of policy and budget issues.

Recommendation: Based on the duties and responsibilities, we recommend that this position be designated as a Strategic Advisor 3, effective March 28, 1998. We also recommend that this position be exempt from Civil Service.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action, using rates effective November 1, 1998, would be \$16,866.05 if the position were paid at midpoint. This figure includes any current and retroactive



cost for this action. The ongoing annual cost for this action would be \$9,199.66 (assuming the position was paid at midpoint). The calculations are based on the differences between the top step of the current salary range and the mid-point of the recommended salary range and include statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: Nov. 6, 1998 Report No.: 98-2544

POSITION IDENTIFICATION

Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 024271
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 2, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$25.20 - \$34.02 (No Range)
Remarks: Redesignation effective 3/28/98.

INCUMBENT STATUS

Incumbent:
Current Standing: NA
Recommended Standing: NA
In recommended standing, incumbent status is: N/A
[] Regular; [] Probationary; [] Temporary
Authority: Personnel Rule
[] 2.3.100; [] 2.3.200; [] 2.3.300.
Remarks:

Recommended: Team 1 [Signature] Classification/Compensation Analyst(s)
Approved: Edie Jorgensen [Signature] Classification/Compensation Supervisor
----- [Signature] Classification/Compensation Director
[Signature] Norma McKinney Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). CBO is a newly created office responsible for assisting the Mayor and City Council in the development of budget programs which carry out Executive and Legislative goals; developing the biennial City budget and capital improvement plan consistent with the Comprehensive Plan and adopted goals and policies; monitoring budgetary processes and expenditure levels of projects which meet goals delineated in the plan; and coordinating and reviewing budgetary accountability for meeting performance objectives established by departments. This position is responsible for analyzing budget, financial and policy issues of assigned departments, programs or issues on behalf of the City and making recommendations to the City Budget Director and the Mayor. This position presents and defends the Mayor's Proposed Budget and Capital Improvement Program before the City Council; represents the City Budget Office in meeting with other City departments and outside agencies; serve as lead staff for projects involving multiple City departments focusing particularly on issues of Citywide significance with large financial ramifications. The position will present and defend the Executive's position on complex and sometimes controversial issues, and represent and pursue the City's interests on regional issues in meetings and negotiations with partner jurisdictions, including King County, the Port of Seattle and suburban jurisdictions.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created: the Strategic Planning Office (SPO) and the City Budget Office (CBO). With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst(s) (PMA), the CBO requested the position(s) be reviewed for possible inclusion into the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive financial issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality), the CBO also requested that the positions continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 525 points, placing the position in the Pay Zone 2. The points for each dimension are listed below:



Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Low/0	Med/75	Low/0	High/100	High/100

It is recommended this position continue to be exempt from civil service rules. It works on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness and confidentiality. This position is responsible for the development and management of core policy planning issues which will affect the operation of the City's operating departments and all of our citizens over the next several years. As CBO is viewed and used by the Mayor as an extension of the Mayor's Office, the work of this position necessitates the highest level of confidentiality and accountability. With this confidentiality, a full spectrum of policy options may be explored in draft format in various forms not yet ready for public viewing. A breach of confidential issues, discussions, proposals, and/or concepts could result in great damage in the ability to execute the Mayor's goals for the City. Additionally, this position will be, at various times, accountable in an advisory capacity directly to high level CBO Executive management, City Council and the Mayor on the development of these policy issues.

Based on the duties and responsibilities, we recommend that this position be designated as a Strategic Advisor 2, Exempt, effective March 28, 1998, the date the CBO was created.

Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using rates in effect November 1, 1998, there is a cost savings to the department of \$1,581.95. The ongoing annual savings would be \$1,898.34. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary range and includes statutory benefits (*FICA, etc.*). The actual amount payable to any affected employee will vary.





CLASSIFICATION DETERMINATION REPORT

Date: November 4, 1998

Report No.: 98-2552

POSITION IDENTIFICATION

Department: Executive Services/City Budget Office
Classification Title: Exempt
Ordinance Title: Policy & Management Analyst
Position Number: 022970
Bargaining Unit: 130 Current Salary and Range: \$21.50 - \$30.39 (No Range)

RECOMMENDED ACTION

Classification Title: Exempt
Ordinance Title: Strategic Advisor 2, Exempt
Legislation Required: Yes
Bargaining Unit: 140 Recommended Salary: \$25.20 - \$34.02 (No Range)
Remarks: Redesignation effective March 28, 1998

INCUMBENT STATUS

Incumbent:
Current Standing: N/A
Recommended Standing: N/A
In recommended standing, incumbent status is: N/A
 Regular; Probationary; Temporary
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *ijo* Classification/Compensation Analyst(s)

Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor

DEB Classification/Compensation Director

Norma McKinney *NM* Personnel Director



SOURCE OF REQUEST

This position was reviewed as a result of a request from the Executive Services Department, City Budget Office (CBO). CBO is a newly created office responsible for preparing, reviewing and securing adoption of the City's annual budget and capital improvement projects. Position # 022970 is located in the CBO, and it is responsible for analyzing the financial, budget, and policy issues related to large or complex departments, programs or issues. The position is also responsible for communicating the findings to City departments, Mayor, Deputy Mayors and the City Council.

Background Information

In 1998, Mayor Schell reorganized the Office of Management and Planning (OMP). As a result of that action, two offices were created, the Strategic Planning Office (SPO) and the CBO. With the demise of OMP, the 'broad band' personnel program, implemented in 1997, is nullified. Instead of revising the program and title of the Policy and Management Analyst (PMA), the CBO requested the position be reviewed for possible inclusion in the Citywide Strategic Advisor program. Since the PMAs are currently exempt from civil service rules, (due to the fact that they work on sensitive issues requiring a particularly high degree of individual professional accountability, responsiveness, and confidentiality) and the duties have not changed, the CBO also requested that the position continue to be exempt.

ANALYSIS AND RECOMMENDATION

Scope of Review: This position was reviewed by a team of class/comp analysts for inclusion in the Strategic Advisor Program. The point factor analysis yielded 525 points, placing the position in the Pay Zone 2. The points for each dimension are listed below:

Point Factor Dimensions:

Program	Policy	Technical	Budget/ Fiscal	Human Resources	Communications	Matrix
Med/75	Med/175	Limited/0	Med/75	Limited/0	Hi/100	Hi/100

Recommendation:

Since this position met the exemption criteria (per SMC 4.13); and based on its duties and responsibilities, we recommend that this position continue to be exempt from civil service rules; and be designated to the title of Strategic Advisor 2, Exempt. This action is effective March 28, 1998, the date of the ordinance (# 118912) which abolished OMP and created CBO.



Costing:

If implemented on the 1998 Fourth Quarter Ordinance, using the rates in effect as of November 1, 1998, there is a cost savings to the department of \$2,985.84. The ongoing annual savings for this action is \$1,898.34. The calculations are based on the difference between the top step of the current and the midpoint of the recommended salary ranges and includes statutory benefits (*FICA, etc.*).





CLASSIFICATION DETERMINATION REPORT

Date: November 25, 1998

Report No.: 98-2565

POSITION IDENTIFICATION

Department: Executive Services Department (ESD), Facility Services Division
Classification Title: Warehouseman
Ordinance Title: Warehouseman - BU
Position Number: 011311
Bargaining Unit: 007 Current Salary: \$14.85 - \$16.03 (Range: N/A)

RECOMMENDED ACTION

Classification Title: Senior Warehouseman
Ordinance Title: Warehouseman, Senior - BU
Legislation Required: Yes
Bargaining Unit: 007 Recommended Salary: \$16.36-\$17.65 (Range: N/A)
Remarks: Effective date of reclassification: September 3, 1997.

INCUMBENT STATUS

Incumbent:
Current Standing: Warehouseman
Recommended Standing: Senior Warehouseman
In recommended standing, incumbent status is:
 Regular; Probationary; Temporary.
Authority: Personnel Rule
 2.3.100; 2.3.200; 2.3.300.
Remarks:

Recommended: Team 1 *EDS* Classification/Compensation Analyst(s)

Approved: Edie Jorgensen *EJ* Classification/Compensation Supervisor

DEB Classification/Compensation Director

Norma McKinney *NM* Personnel Director



Source of Request and Position Identification:

This position was reviewed as a result of a request from the Executive Services Department. The position is located in the Facility Services Division.

Position History:

Detailed historical data of the position can be accessed via the Personnel Division's Records Unit. The subject position was created effective November 1, 1951, by Ordinance 80460.

Scope of Review:

This review was conducted by Carl Swanson, Classification Analyst assigned to Team 1. The review of the subject position included analysis of the following:

- ◆ the Position Description Questionnaire (PDQ) submitted for this review;
- ◆ Team 1's review and analysis of the subject position 's information;
- ◆ review of the organization chart affecting the subject position;
- ◆ position's history records and related classification files.

Summary of Work:

The essential purpose of this position is to operate a small warehouse for 5 shops.

Duties include:

- ordering materials (25%);
- maintaining inventory records (25%);
- processing and identifying receiving tickets and invoices (25%);
- acting as fill-in person as needed to answer telephones (5%);
- acting as the primary contact with vendors/sales representatives (5%);
- responding to requests for materials not located in the warehouse (3%);
- identifying and preparing all surplus materials for pick up or disposal as required (2%); and
- driving a van or other vehicles to make deliveries and pick up materials ordered in support of warehouse activities (10%).

Note: For a more complete listing of duties and responsibilities, please refer to the Position Description Questionnaire submitted for this review and included in the position file.



Analysis:**class concepts:****WAREHOUSER**

Positions in this class, under continuing supervision, receive, store and issue a variety of equipment, materials, and supplies in a warehouse or storage area. Other duties include: updating automated inventory system; preparing forms for replenishing stock; or under direction of a lead worker or supervisor, ordering equipment, materials and supplies.

SENIOR WAREHOUSER

Positions in this class, under general supervision, order, receive, inspect and issue a wide variety of equipment, materials, and supplies; may operate a satellite or small warehouse or may act as lead over subordinate warehousemen; and maintain a computerized inventory control system.

The subject position meets the class concept for Senior Warehouseman because it is responsible for operating a small warehouse. The duties assigned are of a level appropriate to this title. This position does not have lead duties over subordinate Warehousemen.

Recommendation:

Based on the duties and responsibilities assigned, we recommend that this position be reclassified to Senior Warehouseman, effective September 3, 1997, as indicated by departmental management.

Costing

If implemented on the 1998 Fourth Quarter Ordinance, the maximum estimated cost of implementing this action would be \$9,150.99. This figure includes any current and retroactive (if applicable) cost for this action. The ongoing annual cost for this action would be \$3942.71. The calculations are based on the difference between the top step of the current and the recommended salary range and includes statutory benefits (FICA, etc.). The actual amount payable to any affected employee will vary.



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