



Office of the City Manager

CONSENT CALENDAR
September 11, 2007

To: Honorable Mayor and
Members of the City Council

From:  Phil Kamlarz, City Manager

Submitted by: David W. Hodgkins, Director of Human Resources

Subject: Classification: Health Administrative/Financial Specialist

RECOMMENDATION

Adopt a Resolution to amend Resolution No. 61,840–N.S., Classification and Salary Resolution for Public Employees Union Local One, to establish the classification of Health Administrative/Financial Specialist with a salary range of \$6,897 – \$8,335 per month effective September 17, 2007.

FISCAL IMPACTS OF RECOMMENDATION

The Health and Human Services Department will eliminate a Senior Management Analyst position in FY 2008 and apply the savings to fund the incremental increase in salary and benefits for this new classification of Health Administrative/Financial Specialist. The total cost of salaries and benefits to establish and fill this class is \$3,900 for the remainder of FY 2008. The cost for FY 2009 is \$7,800. The Department will fund the new position from the Short Doyle Mental Health MediCal fund, Budget Code 065-4401-440.11-01.

CURRENT SITUATION AND ITS EFFECTS

The Health and Human Services Department has five divisions in addition to the Office of the Director and Administration: Mental Health, Environmental Health, Public Health, Aging Services and the Youth Employment Program. Over the last several years the Department has reduced its reliance on the general fund by actively seeking revenue from a variety of outside funding sources including grants, Medi-Cal, Proposition 63 Mental Health Services Act implementation, and additional county, state and federal sources. This has enabled the Health and Human Services Department to continue to provide high quality and extensive services to meet the needs of the Berkeley community. Obtaining additional funding through these sources has placed an emphasis on the administrative and financial functions of the Department to ensure compliance with funding requirements. This involves additional resources to collect data and analyze trends and services in order to maintain compliance with grants and other funding sources. The growth of this activity requires the establishment of a new

classification to specifically manage the administrative and financial services of a division in the Health and Human Services Department.

The proposed Health Administrative/Financial Specialist is a section head within a division in the Health and Human Services Department intended to address the need for a management-level classification to provide the necessary administrative and financial support at the divisional level. The classification will report to the Manager of a division, and will be responsible for administrative and program management activities, division budget, fiscal control and reporting requirements, and will play an active role in developing policy and programmatic procedures within the assigned division.

BACKGROUND

The Personnel Board discussed the proposal at its July 2, 2007 meeting. By a unanimous vote, (Dixon, Chan, Eblé, Robinson, Silver, – yes; Bess, Reyes, Smith, – absent), the Board recommended the following:

1. Establish the classification of Health Administrative/Financial Specialist, exempt from the overtime provisions of the Fair Labor Standards Act (FLSA), in Representation Unit M (Career Management), with a monthly salary range of \$6,897 - \$7,220 - \$7,615 - \$7,975 - \$8,335.

RATIONALE FOR RECOMMENDATION

It has been the policy of the City to maintain and revise the classification and salary schedule on a regular basis to accommodate assignment of new duties and responsibilities, to maintain competitive salaries and, when applicable, to comply with regulatory requirements.

ALTERNATIVE ACTIONS CONSIDERED

None

CONTACT PERSON

David W. Hodgkins, Director of Human Resources, 981-6805

David Abel, Human Resources Manager, 981-6807

Attachments:

1. Resolution and Exhibit A: Salary Schedule
2. Personnel Board Item (6/2/07) with attachments

RESOLUTION NO. ##,###-N.S.

AMEND RESOLUTION 61,840–N.S., TO ESTABLISH CLASSIFICATION: OF HEALTH ADMINISTRATIVE/FINANCIAL SPECIALIST

WHEREAS, the Health and Human Services Department has reduced its reliance on the general fund by obtaining funding through outside sources such as grants, Medi-Cal, Mental Health Services Act implementation, and additional county, state and federal sources; and

WHEREAS, the Director of Health and Human Services has recommended that the class of Health Administrative/Financial Specialist be established with duties and responsibilities related to the administrative and financial functions of a Division within the Department to ensure compliance with funding requirements; and

WHEREAS, Public Employees Union Local One has reviewed and responded to the proposal to establish the new classification of Health Administrative/Financial Specialist; and

WHEREAS, the Personnel Board recommended on July 2, 2007 to establish the classification of Health Administrative/Financial Specialist, exempt from the overtime provisions of the Fair Labor Standards Act (FLSA), in Representation Unit M (Career Management), with a five step monthly salary range of \$6,897 - \$7,220 - \$7,615 - \$7,975 - \$8,335.

NOW THEREFORE, BE IT RESOLVED by the Council of the City of Berkeley that Resolution No. 61,840–N.S., Classification/Salary Resolution for Public Employees Union Local One, is amended to establish the class of Health Administrative/Financial Specialist with a salary range as shown on Exhibit A, effective September 17, 2007.

Exhibit A

Salary Schedule

Job Code	Unit Class		FLSA	A	B	Steps			Effective Date
						C	D	E	
2825	M	Health Administrative/Financial Specialist	E	\$6,897	\$7,220	\$7,615	\$7,975	\$8,335	09/17/07



Human Resources Dept.

July 2, 2007

To: Members of the Personnel Board

From: David W. Hodgkins, Director of Human Resources

Subject: Recommendation to Establish the Classification of Health Administrative/
Financial Specialist effective September 17, 2007

BACKGROUND AND CLASSIFICATION

Fred Medrano, Director of Health and Human Services, has requested that the City establish a new classification of Health Administrative/Financial Specialist to manage the administrative and financial functions in a division of the Health and Human Services Department.

The Health and Human Services Department has five divisions in addition to the Office of the Director and Administration: Mental Health, Environmental Health, Public Health, Aging Services and the Youth Employment Program. Over the last several years the Department has reduced its reliance on the general fund by actively seeking revenue from a variety of outside funding sources including grants, Medi-Cal, proposition 63 Mental Health Services Act implementation, and additional county, state and federal sources. This has enabled the Health and Human Services Department to continue to provide high quality and extensive services to meet the needs of the Berkeley community. Obtaining additional funding through these sources has placed an emphasis on the administrative and financial functions of the Department to ensure compliance with funding requirements. This involves additional resources to collect data and analyze trends and services in order to maintain compliance with grants and other funding sources. The growth of this activity requires the establishment of a new classification to specifically manage the administrative and financial services of a division in the Health and Human Services Department.

Mr. Medrano has assessed the Department's organizational structure and what is needed to effectively administer these growing functions. Human Resources staff analyzed both the existing Senior Budget Specialist and Senior Management Analyst to determine if either of those classifications could be used to perform these functions. The Senior Budget Specialist classification is not an appropriate fit because it is characterized as a single position in a large department performing budgetary and fiscal management duties on a department-wide basis, whereas the proposed new

Classification: Health Administrative/Financial Specialist

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classification is a combination of financial and administrative functions located in a division within the Health and Human Services Department. The Senior Management Analyst classification does not provide for the scope and complexity of

responsibilities as they pertain to the provision of state, federal and private funding of health services, or the administrative responsibilities over the management of staff and programs related to applicable health programs. The proposed Health Administrative/Financial Specialist is a section head within a division in the Health and Human Services Department intended to address the need for a management-level classification to provide the necessary administrative and financial support at the divisional level.

The classification will report to the Manager of a division, and will be responsible for administrative and program management activities, division budget, fiscal control and reporting requirements, and will play an active role in developing policy and programmatic procedures within the assigned division. The classification will serve as the division's budgetary and fiscal liaison with state, federal and other funding organizations and ensure administrative compliance with funding sources. This classification may supervise a staff of professional, technical and administrative support staff within the division assigned.

Initially this classification will be used in the Mental Health Division of the department, but additional positions in this classification may be allocated in the future to other divisions in the Department as required. Attachment A is the proposed classification specification for the Board's review.

SALARY

An external salary survey (Attachment B) was conducted comparing similar classifications in surrounding agencies that perform comparable administrative and financial functions in their health departments. Based on the survey results, the median compensation - salary and CalPERS Employer Paid Member Contribution (EPMC) - is \$8,201 per month at the top step. When salaries are reviewed, the Human Resources Department considers the external market and internal relationships among classifications to arrive at a salary commensurate with the duties and responsibilities of the classification. On the basis of these elements and the level and responsibility of the classification, we propose a monthly salary range of \$6,897 - \$8,335. This represents a compensation (salary and EPMC) amount of \$9,183 at the top step, which is 10.69% above the external survey median.

Due to the level and scope of duties and responsibilities of the new classification, it is necessary to establish the salary above the Senior Management Analyst for the reasons noted in the previous section of the report. The proposed salary is approximately 4.5% above the Senior Management Analyst, and aligns the new classification with the Senior Budget Specialist. This maintains the internal alignment of the compensation plan while providing potential promotional opportunities for individuals at the Senior Management Analyst level. While the Senior Budget Specialist classification could not be used to perform the functions of the new classification, it is at a comparable level in the organization for salary administration purposes.

Classification: Health Administrative/Financial Specialist

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We have reviewed this classification and proposed salary with Public Employees Union Local One in a meeting held on June 26, 2007, and they concur with this recommendation.

RECOMMENDATION

Therefore, the Personnel Board is requested to recommend the following to the City Council:

1. Establish the classification of Health Administrative/Financial Specialist, exempt from the overtime provisions of the Fair Labor Standards Act (FLSA), in Representation Unit M (Career Management), with a monthly salary range of \$6,897 - \$7,220 - \$7,615 - \$7,975 - \$8,335.

Attachments

- A. Health Administrative/Financial Specialist Classification
- B. Salary Survey
- C. Local One Response

cc: David Abel, Human Resources Manager
Fred Medrano, Director of Health and Human Services
Harvey Tureck, Manager of Mental Health Services
Paul Howard, Senior Human Resources Analyst
Robert Kraus, Senior Human Resources Analyst

City of Berkeley
Class No. 2825
September 2007

HEALTH ADMINISTRATIVE/FINANCIAL SPECIALIST

DEFINITION

Under general direction, plans, organizes and administers the financial and administrative functions of a Division in the Department of Health and Human Services; serves as the Division's budgetary and fiscal liaison with state, federal and other funding organizations; and performs related work as assigned.

CLASS CHARACTERISTICS

This is a section head class responsible for the financial and administrative service activities of a Division in the Health and Human Services Department. The Health Administrative/Financial Specialist plans, develops, coordinates and manages the division budget, establishes fiscal objectives, and develops and implements policies, procedures and internal control systems for budgetary, accounting, fiscal control and reporting; and has overall administrative compliance responsibility for grants and other health funding sources. The incumbent has administrative and program management responsibilities within the assigned Division, and may supervise professional, technical, accounting, and administrative support staff. This class is distinguished from the higher level Deputy Director of Health and Human Services class in that the latter assists in the day-to-day management of the entire Health and Human Services Department and has responsibility for overall departmental administrative and budgetary activities. It is further distinguished from the lower-level Senior Management Analyst class by the scope and complexity of its administrative and fiscal management responsibilities as they pertain to the provision of state, federal and private funding of health services to the public.

EXAMPLES OF DUTIES

The following list of duties is intended only to describe the various types of work that may be performed and the level of technical complexity of the assignment(s) and is not intended to be an all-inclusive list of duties. The omission of a specific duty does not exclude it from the position if the work is consistent with the concept of the classification, or is similar or closely related to another duty statement.

1. Analyzes, recommends and implements changes regarding fiscal tracking, control and reporting, organizational structure, staffing, facilities and equipment;
2. Serves in a consultative role to departmental management on administrative and related issues and strategies; provides significant input into policy, operational and service delivery decisions; develops and implements policies, procedures and programmatic changes as required;
3. Reviews accounting data to assure conformance with revenue expectations and expenditure plans; makes fiscal projections, validates long-range financial

assumptions, and establishes funding needs or determines opportunities for improvement in fiscal performance;

4. Resolves accounting discrepancies directly or through the work of subordinates; assists line management in establishing costs and required resources of new programs, staff or services;
5. Plans, organizes, assigns, directs, reviews and evaluates the work of professional, technical, accounting, and administrative support staff, and participates in the selection, training, and discipline of staff;
6. Manages the administration of specified grant-funded programs; develops reporting systems including preparation of annual Medi-Cal cost report, State Department of Mental Health and Alameda County fiscal reporting to ensure that funding requirements are met, and coordinates preparation and response to fiscal audits;
7. Develops, negotiates, and administers contracts with private and public health and/or human service care providers;
8. Conducts and directs a variety of fiscal and administrative studies including ongoing budget analysis and reporting, prepares and presents written recommendations and reports for management decision support;
9. Serves as a liaison among funding agencies, the City, and the Health and Human Services Department on fiscal matters;
10. Prepares written reports and statistical analyses, Council reports and Resolutions;
11. Evaluates proposed or new legislation, as well as county, state and federal program requirements, and develops related policies and procedures;
12. Coordinates Health Insurance Portability and Accountability Act (HIPAA) compliance, assures division fiscal and Management Information Systems compliance and implements related HIPAA policies and procedures;
13. Coordinates with program supervisors and provides administrative support for facilities maintenance and repair, janitorial services and emergency response; and
14. Performs related duties as required.

QUALIFICATIONS

Note: The level and scope of the knowledge, skills and abilities listed below are related to job duties as defined under Class Characteristics.

Knowledge of:

1. City, county, state and federal welfare and social service programs and agencies; rules, regulations and ordinances pertaining to City health and/or human services programs, clinics and facilities;
2. Techniques of supervision including planning, assigning and monitoring work and evaluation of assigned staff;
3. Public administration principles and practices; organization and functional structure of local government.
4. Principles and practices of budget forecasting and development, cost accounting, and fiscal control;
5. Techniques of contract administration, negotiation, preparation and monitoring;
6. Financial, statistical, and comparative analysis techniques and formulae; and
7. Business computer user applications related to the work such as Microsoft Word, Excel, Access, PowerPoint, and related programs and systems.

Skill in and ability to:

1. Plan, organize, assign, direct, review and evaluate the work of assigned staff, and develop and implement goals and objectives;
2. Collect, evaluate and interpret varied information and data, either in statistical or narrative form;
3. Analyze complex administrative, operational, fiscal, economic and organizational problems; evaluate alternatives and reach sound conclusions; and implement effective change;
4. Operate a computer with proficiency and familiarity;
5. Interpret and apply laws, regulations, policies and procedures;
6. Prepare clear, concise and complete reports and other written materials;
7. Maintain accurate records and files;
8. Coordinate multiple projects and meet critical deadlines;
9. Exercise sound independent judgment within established guidelines; and
10. Establish and maintain effective working relationships.

OTHER REQUIREMENTS

Must be able to travel to various locations within and outside the City of Berkeley to meet the program needs and to fulfill the job responsibilities. When driving on City business, the incumbent is required to maintain a valid California driver's license and satisfactory driving record.

A TYPICAL WAY OF GAINING THE KNOWLEDGE AND SKILLS OUTLINED ABOVE IS: Equivalent to graduation from a four-year college, with major coursework in business, public or health administration, economics, accounting, or a closely related field; and four (4) years of progressively responsible full-time, professional experience in public administration, health administration or business management involving budgetary, accounting, and fiscal management, and general administrative services, at least one (1) year of which included supervising staff.

A master's degree in public administration, financial management, accounting or health administration may be substituted for one (1) year of the required experience. Grants accounting and administration experience, and completion of college-level budgetary and governmental accounting courses are highly desirable.

File: Health Administrative/Financial Specialist
Established: 9/07

HEALTH ADMINISTRATIVE/FINANCIAL SPECIALIST

Salary Survey

Agency	Class Title	Max Salary	EPMC (%)	EPMC (\$)	401(a)	Adjusted Max
Alameda County	Administrative/Financial Services Manager	\$8,481	3.00%	\$254	\$0	\$8,735
Marin County	Assistant Chief Fiscal Officer, HHS	\$8,285	3.82%	\$316	\$0	\$8,601
San Mateo County	Administrative Services Manager	\$8,278	3.53%	\$292	\$0	\$8,570
Contra Costa County	Administrative Services Officer	\$7,984	2.72%	\$217	\$0	\$8,201
Napa County	Administrative Services Officer	\$7,495	3.80%	\$285	\$0	\$7,780
Yolo County	Deputy Director, Mental Health Administrative/Fiscal Services	\$7,136	7.00%	\$500	\$0	\$7,636
Sonoma County	Administrative Services Officer	\$6,914	0.00%	\$0	\$346	\$7,260
Berkeley	Health Administrative Financial Specialist	\$8,335	8.00%	\$667	\$181	\$9,183

Median \$8,201

Lead (+)/Lag (-) 10.69%

Agency Matches 7

ATTACHMENT C

From: Kathy Rollins [krollins@peu1.org]
Sent: Wednesday, June 27, 2007 1:56 PM
To: Abel, David; Brenman, Eric
Cc: Medrano, Fred; Tureck, Harvey; Howard, Paul
Subject: RE: Local One Support For Health Admin/Fin Specialist

Dave:

Local One has reviewed and supports the proposed **Health Administrative/Financial Specialist** specification. We appreciate Human Resource's agreement on the M Unit designation given the expanded supervisory authority associated with this proposed position and your suggested approach to conduct the Mental Health Division position on a promotional basis, with a separate competitive process for the Public Health Division as appropriate.

Also, for purposes of consistency with the provisions of the MOU, we would note that three (Alameda County, Contra Costa County and San Mateo County) of the seven jurisdictions for which comparative salary data was obtained are recognized under Section 13.12 of the MOU (Equity Studies--attached). We do however understand the difficulty of identifying comparison jurisdictions to the City of Berkeley given particularly health and mental health (county) functions and appreciate Paul's efforts to identify suitable matches.

Lastly, perhaps because of current contract (2002-2008) implemented equity adjustments for the Senior Management Analyst (and not the Senior Budget Specialist position on which this proposed position is banded), we would note that the proposed monthly maximum salary falls just short (4.4%) of the minimum 5% differential--\$ 7,977 versus the current (as of 6/21/07) \$ 7,938. While this involves a small amount, it would seem to makes sense to address this minor compaction at this time, particularly with another similar position under consideration for Public Health. Please confirm if you are willing to agree to this adjustment to the recommended salary.

Thanks very much for HR and H&HS' constructive collaborative on this new position.

Kathy Rollins
Supervising Business Agent
Public Employees Union, Local One
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