



Oregon

John A. Kitzhaber, MD, Governor

Department of Administrative Services

Enterprise Human Resource Services

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MEMORANDUM

To:

From:

Date:

Subject: Reclass Position No.

POSITION AND EMPLOYEE DATA

Position Number:

Incumbent:

Supervisor:

Division/Section:

Current Classification: OA C0212 Accounting Tech 3, SR 19

Reclassify position to: OA C0108 Administrative Specialist 2, SR19

FLSA: Non-Exempt

Service Type: Classified Represented

Effective Date:

BACKGROUND & BUSINESS NEEDS JUSTIFICATION

In the 2009 legislative session, the Joint Committee on Ways & Means passed DAS' budget bill, House Bill 5002, attaching a budget note that directed AS to convene a workgroup to review the department's structure, service delivery, and funding mechanisms.

The budget note called for DAS to convene a workgroup that included representatives from other state agencies, other branches of government, and the private sector to find ways to improve DAS' service and policy delivery while ensuring fair and agile funding mechanisms.

THE HB5002 Workgroup began by researching other state-government structures. Two states surfaced as models. Iowa and Minnesota used service/policy split in their administrative infrastructure. Both states had used specific process methodologies to gain greater effectiveness and garner efficiencies. Minnesota uses Lean tools in its reform initiative called "Drive to Excellence" while Iowa has adopted the entrepreneurial management model to reform its administrative services.

Research by the HB5002 Workgroup, review of service models, and DAS' customer and employee surveys as well as strategic planning efforts and discussions with stakeholders led to

Commented [MD*C1]: This section details what has changed that has created the need for a classification change. For new positions, what has changed in the organization that has created the need for this position to be established.

the choice to adopt Entrepreneurial Management as a key strategy to achieve DAS' strategic goals of "the right service, at the right time, for the right price" and "effective, high-quality governance and oversight."

DAS launched the Entrepreneurial Management Advisory Council (EMAC) on December 8, 2010. EMAC consisted of customers, DAS leaders, private sector representatives and union leadership. EMAC was tasked with the initial effort to "slot" DAS services into utility or marketplace services, define the rules of engagement of the resulting enterprises, and recommend the membership and charter of the utility customer boards that will govern the utility services.

Enterprise Human Resource Services is working on the many structure and duty changes for the employees whose roles and functions have changed in the new model. Additionally, as a result of House Bill 2020 and House Bill 4131, we are evaluating all supervisory roles within the organization to ensure we make progress towards achieving the 11:1 supervisory ratio.

CLASS SPECIFICATIONS CONSIDERED

Accounting Tech 3, Administrative Specialist 1, Administrative Specialist 2

Commented [MD*C2]: Detail all classifications relevant to this analysis. Only compare the relevant classifications. For classifications in a series, perform an analyses of the classifications up and down.

Administrative Specialist 1

Commented [MD*C3]: In this section list the general description of class and the distinguishing features. Do not put the typical duties or other sections. We want this to capture the point in time classification. Class specs change and this allows a reviewer down the road to see what was considered at that time. Also, some arbitrators have only wanted to include information listed in the review. So this allows for relevant information to be considered.

The Administrative Specialist 1 performs and/or coordinates administrative tasks in support of an agency program or operation. The work performed is usually concentrated in a specific program or operational area, requiring in-depth knowledge of that program or operation.

This class is distinguished from the higher level by the absence of responsibility for interpreting laws, rules, policies and procedures, and applying those interpretations to specific situations, some of which may be non-routine. Employees in this class are further distinguished from the higher level by the absence of responsibility for assisting a manager in administrative research, analysis, evaluation, and interpretation. At the higher level, problems are resolved and compliance gained through negotiation with the parties involved. Employees in this class coordinate activities to ensure a smooth flow of services and operations which may include tracking, scheduling and delivery of services. Employees are responsible for coordination of an entire process on an agency-wide basis. Employees in this class seek to resolve problems through discussion and explanation of information. Employees in this class have limited, if any, general office support duties.

Administrative Specialist 2

The Administrative Specialist 2 assists a program coordinator, program manager, or other administrative superior in the ongoing direction of an agency program or operation or performs administrative research, analysis, and/or evaluation in support of an agency program or operation. The work performed requires a comprehensive knowledge of the program or operational area to which assigned.

This is the second level of a two-level series. This class is distinguished from the lower level by the responsibility for interpreting laws, rules, policies and procedures, and for applying those interpretations to specific situations some of which may be non-routine. At this level there is responsibility for assisting a manager who is responsible for one or more programs or operations with monitoring and/or auditing a program or operation, and administrative research, analysis, evaluation, interpretation for projects or studies related to a program area. Problems are resolved and compliance gained through negotiation.

Accounting Technician 3

The Accounting Technician 3 maintains specialized accounting record systems including resolving errors, balancing accounts and records, and preparing reports. Helps lower level accounting staff solve technical problems.

This is the third of a three level technical support series. The work requires the application of advanced accounting methods and the knowledge of a range of accounting principles. Specialized, more complex process work (unrelated tasks, more intricate steps) such as monitoring fiscal activity and designing reports distinguish this class from the next lower class.

ANALYSIS/CONCLUSION

Recommended Classification: Administrative Specialist 2

The purpose of this position is to manage and coordinate personnel support as the Personnel Coordinator with two divisions. The position supports managers with personnel policies and to maintain consistency and compliance with State rules, DAS and division policies, procedures and guidelines. The position provides program and operational support, strategic planning and policy development recommendations, interoffice communications and execution of the program's internal procedures to the Shared Financial Service Division. This position ensures compliance in responsiveness and standardization among managers. This position advises managers by interpreting and explaining agency policies and procedures, State ORS and is the Administrative Assistant.

The Accounting Technician 3 is not the correct classification for this position. (Statement) The Accounting Tech 3 maintains specialized accounting record systems including resolving errors, balancing accounts and records, and preparing reports. Helps lower level accounting staff solve technical problems (Classification detail). This position is no longer responsible for performing duties related to accounting records. The duties performed are administrative support, there for the Accounting Technician series is no longer correct for this position. (Analysis/Support of Statement)

The Administrative Specialist 1 is not the correct classification for this position. (Statement) The Administrative Specialist 1 is distinguished from the higher level by the absence of responsibility for interpreting laws, rules, policies and procedures. (Classification Detail) This position is responsible for providing support to managers with personnel policies, and to maintain

Commented [MD*C4]: Good rule of thumb, give at least one reason why it is not a specific classification and 2-3 examples of why it is. Utilize the Classification information given in the General Description of Class and Distinguishing Features. Do not reference the typical duties sections as duties can be performed at multiple levels.

consistency and compliance with State Rules, DAS and division policies, procedures and guidelines. (Support of Statement)

The Administrative Specialist 2 is the correct classification for this position. (Statement) The Administrative Specialist 2 assists a program coordinator, program manager, or other administrative superior in the ongoing direction of an agency program or operation or performs administrative research, analysis, and/or evaluation in support of an agency program or operation. (Classification Detail) This position supports the Shared Financial Services division's manager in the ongoing direction of the agency program. This position provides program and operational support, strategic planning and policy development recommendations, interoffice communications and execution of the program's internal procedures. (Support of Statement)

This classification is distinguished from the lower level by the responsibility for interpreting laws, rules, policies and procedures. (Classification Detail) This position is responsible for interpreting the Attorney General's Model Rules for Purchasing, Oregon Revised Statutes Chapter 279, Oregon Accounting Manual, Department of Administrative Services Rules, division rules and policies, Collective Bargaining Agreements and personnel procedure manuals. This position provides general guidance and policy directions and framework. This position must use judgment and interpretation and application for each policy and procedure. This position recommends revision to the above guidelines, including justification and need for revision. (Analysis/Support of Statement)

FLSA

This position meets the criteria under the FLSA to be non-exempt. This position does not customarily and regularly exercise discretion and independent judgment. Additionally this position does not perform work requiring knowledge of an advance type in a field of science or learning, work that is original and creative in character in a recognized field of artistic endeavor, or teaching, tutoring, or lecturing in the activity of imparting knowledge. This position does not perform as a primary duty the management of the enterprise or of a customarily recognized department or subdivision. Therefore, non-exempt and eligible for overtime is appropriate.

Commented [MD*C5]: FLSA needs to include an actual analysis of why it meets a specific criteria or doesn't, not just a statement of which the agency believes it is.

SERVICE TYPE

This position does not meet managerial, confidential or supervisory exclusion criteria. This position does not assist and acts in a confidential capacity to a person who formulates, determines and effectuates management policies in the area of collective bargaining. This position does not possess the authority to formulate and carry out management decisions, or represents management's interests and does not have the discretion in the performance of these management responsibilities beyond the routine discharge of duties. This position does not exercise supervisory authority to hire, discharge, reward or discipline. Therefore, classified and represented by SEIU is appropriate.

Commented [MD*C6]: Similar to the FLSA, an analysis needs to be done, detailing why or why not a specific exclusion is appropriate.