



Budget Change Request

Change request information

Title Fiscal Classification Change - Fiscal Manager to Senior Management
Number B-27-10 Department 27 - Community
Requester Summer Miller
Published by Jennifer Smith Publish Date 2023-08-24
Change Type Policy Change

Board outcome *(to be entered by budget after Board action)*

Board Decision
Board Changes

Funds affected

Fund 4124 - Land Use &
General Fund Affected? No More Than One Fund Affected? Yes

Policy request priority and connection to the strategic plan

Priority # 0 Strategic Plan

Does this request include federal, state, or private grants?

Grant Funded? None
Grantor and timeframe

Does this request affect current positions or propose new positions?

HR Payroll e-mailed? Yes Position Impact Changes Classification
Current position numbers affected 0727-27-R-

What do you need and why? Include any unexpected and external requirements.

Statement of Need

CPED requires a higher level of management support that exceeds the current classification of Fiscal Manager. The Senior Management Analyst position will allow a broader scope of responsibilities to include (but not limited by):

- *developing fiscal work in alignment with County & Department strategic goals,
- *aggregating departmental and divisional data to communicate workload, accomplishments, performance drivers, growth, etc.,
- *preparation of fiscal status summaries & presentation for various audiences,
- *monitoring & reporting on revenues and expenditures at departmental, fund, and org levels,
- *tracking budget drivers & performance,
- *leading budget development efforts,
- *developing internal budget timeline, review, decision-making and communication processes,
- *reporting on effectiveness of budget drivers,
- *reviewing financial plans monthly with County Manager’s fiscal & budget team.
- *hiring, training, mentoring, conducting performance evaluations, and discipline,
- *establishing annual goals & measurement metrics and clearly defined roles & responsibilities for fiscal positions,
- *developing policies & procedures, strategic plans, work programs, lon-term budget analyses, and other programs as assigned,
- *review change request instructions as well as change requests throughout budget deliberation processes and after adoption for quality control,
- *oversee audit efforts,
- *oversee and understand grant monitoring and reporting requirements,
- *proficient in county fiscal systems (Munis, Questica, Eden)

How will this change the performance of your office or department?

Statement of Need

Reclassifying this position will allow CPED to increase deliverables which will benefit county, department, and division strategic goals through better fiscal oversight, management, and forecasting.

Expenditure, FTE and revenue assumptions plus current budget level

Assumptions

Current Budget Level

FY2023 - \$108,516 fully loaded

What happens if this isn’t funded? Are there other options?

Impacts and Alternatives

How does this request affect other offices and departments?

Impact to Other Departments None

Which Other Departments are Affected?

Operating Transfer Needed? No

Operating Transfer Coding and Amount

Personnel Information

FTE	Number	Name	Start Date	End Date
1.00	@ Senior Management Analyst-2	SENIOR MANAGEMENT ANALYST	2024-01-01	

1.00	< Total			
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Operating Revenue Line Items

Org Code	Object Code	Object Description	Project Code	2024	2025
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Capital Revenue Line Items

Org Code	Object Code	Object Description	Project Code	2024	2025
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Operating Expenditure Line Items

Org Code	Object Code	Object Description	Project Code	2024	2025
4124C230	510000	SALARIES		7,706	7,937.00
4124C230	521000	SOCIAL SECURITY		590	607.00
4124C230	522000	RETIREMENT		724	745.00
4124C230	525000	UNEMPLOYMENT COMPENSATION		23	24.00
4124C230	526000	PAID FAMILY MEDICAL LEAVE		17	17.00
4124C230	527000	LONG TERM DISABILITY		44	45.00
			Total:	9,104.00	9,375.00

Capital Expenditure Line Items

Org Code	Object Code	Object Description	Project Code	2024	2025
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