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OAKLAND

2016 JUL -7 PM 5:14 AGENDA REPORT

TO: Sabrina B. Landreth
City Administrator

FROM: Sarah Schlenk
Acting Budget Director

SUBJECT: City Council Finance
& Budget Analyst

DATE: June 30, 2016

City Administrator Approval

Date:

7/7/16

RECOMMENDATION

Staff Recommends That The City Council Receive A Report From The City Administrator On Options For The Hiring Of A City Council Finance & Budget Analyst As An Employee Or Contractor, Including For Each Option An Outline Of Necessary Steps And Recommendations For Supervising And Directing The Position Or Contractor.

EXECUTIVE SUMMARY

The City Council has two options for procuring additional analytic support for the FY 2017-19 biennial budget process: hiring an limited duration Senior Council Policy Analyst or procuring contracted services. Staff recommends hiring the limited duration Senior Council Policy Analyst. Either an employee or a contractor would require supervision from the City Council. The Council should discuss and confirm how the position will be supervised.

BACKGROUND / LEGISLATIVE HISTORY

On June 21, 2016 during the FY 2016-17 Midcycle Budget deliberations, the City Council approved a Budget Amendment that set aside \$80,000 for a City Council Finance & Budget Analyst. The allocation was intended to provide additional analytic support to the City Council on budgetary and financial matters during the 2017-19 biennial budget process.

ANALYSIS AND POLICY ALTERNATIVES

The City Council should develop a scope of work for this position or contractor based upon anticipated support required in the Budget Process. For instance, it is probable that the employee/contractor will be asked to review staff reports such as the Five-Year Forecast, results of Public Polling, Second and/or Third Quarter Revenue & Expenditure Reports, and the Mayor's Proposed Budget.

The employee or contractor will need to quickly develop familiarity with the City Budget, financial policies, processes and procedures.

Item: 7

Special Finance & Management Committee
July 12, 2016

The following options are available to the City Council for utilization of this funding:

- **Option 1** – Hire a limited duration Senior Council Policy Analyst full time with full-time benefits to provide budget/finance analytic support.
- **Option 2** – Contract with a firm to provided budget/finance analytic support.

Hiring Process – The process for hiring an employee would begin with transmittal of a requisition to Human Resources. Subsequently Human Resources would conduct outreach or recruitment to find qualified applicants. Human Resources would then review the skills and qualifications of applications and transmit those best qualified to whomever will be responsible for hiring and supervising the position. Once the final applicant is selected, the standard hiring process and paperwork would be completed.

This process would take roughly two months assuming there is a clear scope of duties and qualified applicants are available. Human Resources and the City Council Administrative staff could assist the supervising office in this process.

Contracting Process – The first step is to develop a scope of work defining the needed service(s). The appropriate staff would work with Contracts and Compliance Department to conduct a formal Request for Proposal/Qualifications advertising and competitive process. This process normally requires a period of two to three months from beginning to contract execution. The processes may be repeated if the City is unable to identify sufficient qualified and acceptable responses or bids.

Staff recommends that the City Council pursue Option 1 -- hiring a limited duration Senior Council Policy Analyst for approximately six months. This process is similar to the existing process for hiring of Council staff, and would allow maximum flexibility in selecting a qualified applicant. Staff does not recommend the contract option, as it is unlikely that the City would receive the scope, scale, and quality of services desired given the funding available.

FISCAL IMPACT

The mid cycle budget added \$80,000 for the purposes described in this report. The annual cost for a Senior Council Policy Analyst at step 3, including all benefit rates, is \$158,489 (monthly salary of \$7,966). If the position begins January 1, 2017 and lasts through June 30, 2017, the cost would be \$80,800 (including the scheduled cost of living increase during that period). Contracted services could cost any amount up to the \$80,000 provided in the budget less any costs required to advertise and conduct the competitive bidding process.

PUBLIC OUTREACH / INTEREST

No public outreach was necessary in the preparation of this report.

COORDINATION

The Human Resources Management Department, Contracts & Compliance Department, and the City Administrator's Office were consulted in preparation of this report.

SUSTAINABLE OPPORTUNITIES

Economic: There are no environmental opportunities associated with this report.

Environmental: There are no environmental opportunities associated with this report.

Social Equity: The procurement of these services could aid the City Council in exploring equity concerns related to the FY 2017-19 Biennial Budget.

ACTION REQUESTED OF THE CITY COUNCIL

Staff recommends that the City Council receive a report from the City Administrator on options for the hiring of a City Council Finance & Budget Analyst as an employee or contractor including for each option an outline of necessary steps and recommendations for supervising and directing the position or contractor.

For questions regarding this report, please contact Brad Johnson, Assistant to the City Administrator at 510-238-6119.

Respectfully submitted,



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CAO - Budget Department

Item: 7

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