

CITY OF OAKLAND

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OFFICE OF THE CITY CLERK
OAKLAND

2018 APR 26 PM 2:16

AGENDA REPORT

TO: Sabrina B. Landreth
City Administrator

FROM: Ian Appleyard
HRM Director

SUBJECT: Amendment to Ordinance No. 12187
C.M.S. (The Salary Ordinance) to Add
Various New Budget Classifications

DATE: April 16, 2018

City Administrator Approval

Date:

4/25/18

RECOMMENDATION

Staff Recommends that the City Council Adopt: (1) A Resolution Recommending To The Civil Service Board The Exemption Of The Classification Of Manager, Finance From The Operation Of Civil Service And (2) A Resolution Recommending To The Civil Service Board The Exemption Of The Classification Of Budget & Management Analyst, Principal From The Operation Of Civil Service And (3) An Ordinance Amending The Salary Schedule Of Ordinance No. 12187 C.M.S. ("Salary Ordinance") To Add the Title Of Manager, Finance; To Add The Title Of Budget & Management Analyst, Principal; To Add The Title Of Budget & Management Analyst, Senior; To Add The Title Of Budget & Management Analyst; And To Amend The Title Of Assistant Budget Analyst To Budget & Management Analyst, Assistant.

EXECUTIVE SUMMARY

Adoption of the resolutions recommending exemption of the Manager, Finance and Budget & Management Analyst, Principal classifications from the Civil Service Board and adoption of the proposed ordinance will ensure accuracy of the City's classification plan and Salary Schedule.

If City Council does not take the recommended actions, the necessary classifications will not be created and would prevent the Finance Department from appropriately classifying, staffing, and filling the various required positions in the Budget Bureau.

BACKGROUND / LEGISLATIVE HISTORY

The Salary Ordinance (Ordinance No. 12187 C.M.S.) establishes salaries as well as other terms and conditions of City employment including the classification titles and bargaining unit designation of positions. The Ordinance is amended from time to time to accommodate the City's evolving classification needs. Pursuant to the Personnel Manual (Civil Service Rules), Section 3.04, components of the City's Classification Plan shall be administered and maintained by the Personnel Director with the approval of the Civil Service Board.

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As applicable regulations or departmental operations change, staff in Human Resources Management (HRM) periodically consults with departments regarding classification needs. Many such changes require HRM to initiate an amendment to the Salary Ordinance to add, amend, or delete certain classifications. The proposed Salary Ordinance Amendment accompanying this report is comprised of a routine action to amend the salary schedule.

ANALYSIS AND POLICY ALTERNATIVES

As stated above, the proposed action is recommended to update the Salary Schedule of the Salary Ordinance to align it with other actions that have taken place including the creation of new classifications and modification to an existing classification title that have been approved by the Civil Service Board. In cases in which union involvement was required, the appropriate notification and/or discussions occurred with the applicable unions (new classifications, title changes, and salary adjustments). The recommended salary rates are commensurate with the rates established for similarly situated existing City classifications.

New Classifications That Are Exempt From Civil Service – Two new classifications are being proposed as an amendment to the City's Classification Plan. Due to the inherent conflict of interest that exists with participating in costing of proposals during contract negotiations, the classifications are proposed to be exempted from civil service and unrepresented by any employee bargaining group.

The new Manager, Finance classification will be responsible for planning, organizing, managing, and directing the work of the department, including a variety of financial operations; assisting with the costing and budgeting related to contract negotiations with employee bargaining groups; participating in the development of labor negotiation strategies; developing and implementing goals, objectives, policies, and procedures; providing support to the Director regarding complex, confidential, and sensitive matters; assisting with the department and citywide budgets; and training and supervising assigned staff.

The new Budget & Management Analyst, Principal classification will be responsible for planning, organizing, and directing difficult, complex, detailed analytical work related to fiscal and budget functions; performing complex analysis of data regarding forecast modeling, statistical modeling, and project development; assisting with the costing of proposals and budgeting related to contract negotiations with employee bargaining groups; participating in the development of labor negotiation strategies; and supervising and training assigned staff. It is a supervisory classification.

The job descriptions will be brought to the Civil Service Board for review of their alignment within the City's overall classification plan and approval of the requests to exempt them from the competitive civil service; it is anticipated that both will be placed on the Civil Service agenda for the June 21, 2018, Civil Service Board meeting.

New Civil Service Classifications – Two new civil service classifications are being proposed as an amendment to the City's Classification Plan. Due to the confidential nature of the work including access to sensitive and confidential bargaining information, the classifications are proposed to be represented by the Confidential Management Employee Association (CMEA).

The Budget & Management Analyst, Senior classification will be responsible for providing highly responsible, complex, and varied financial and analytical work related to the City budget functions; conducting operational and fiscal analysis, budget review, and analysis; preparing complex revenue and expenditure forecasts; evaluating the impact of new or proposed legislation; assisting with labor negotiations costing; may assist with developing labor negotiation strategies; coordinating the activities of the Finance Department with other departments, divisions, and/or outside agencies; and training staff. The classification may supervise assigned staff. It is an advanced-journey level classification in the Budget & Management Analyst series.

The Budget & Management Analyst classification will be responsible for performing professional-level assignments related to the City budget functions in the development, implementation, and administration of financial programs or projects; conducting organizational analysis, budget review, and analysis; providing budgetary and financial support to assigned departments; and assisting with labor negotiations costing. It is a journey level classification in the Budget & Management Analyst series.

Discussions regarding the proposed new classifications took place in meetings between City staff and union representatives from CMEA prior to the action being advanced to Council for approval. The job descriptions will be brought to the Civil Service Board for review of their alignment within the City's overall classification plan; it is anticipated that both will be placed on the Civil Service agenda for the June 21, 2018, Civil Service Board meeting.

Classification Title Change – The title of the existing classification of Assistant Budget Analyst is being changed to Budget & Management Analyst, Assistant, which will ensure that the classification accurately conveys the requirements of the position as needed by the Finance Department in its current configuration and aligns with the new Budget & Management Analyst series.

Discussions regarding the proposed revised classification took place in meetings between City staff and union representatives from the International Federation of Professional and Technical Employees (IFPTE, Local 21) prior to the action being advanced to Council for approval. After those discussions concluded, the classification was scheduled for the Civil Service Board on April 19, 2018. The Board approved the revisions to the classification specification to amend the City's classification plan at its April 19, 2018, meeting.

FISCAL IMPACT

Adoption of the proposed Salary Ordinance Amendment is budget-neutral and does not require a change in the overall allocations for the Finance department. For the new Finance classifications, placeholder positions were included as part of the adopted FY 2017-2019 budget cycle. Once the correct titles are established, the placeholder positions will be converted to positions with the new titles.

PUBLIC OUTREACH / INTEREST

No public outreach was necessary other than the required posting on the City's website.

COORDINATION

HRM Department coordinated with the Finance Department regarding the addition of the new classifications and title change to the existing classification. When necessary, Employee Relations was also involved. Representative unions, as applicable, were formally notified of the proposed legislation because the related actions are mandatory subjects of bargaining. Discussions took place and there were no objections raised by the representative unions. Union involvement was not necessary for the Manager, Finance and Budget & Management Analyst, Principal classifications because the related action is not subject to mandatory bargaining regulations in these cases.

Public notices regarding the Civil Service Board action to except the classifications from the competitive civil service and approve the classification specifications are posted pursuant to the provisions of the California Brown Act and City of Oakland Sunshine Ordinance.

Additionally, the preparation of this report was coordinated with HRM, City Attorney's Office, Finance Department Budget Bureau, and the City Administrator's Office.

SUSTAINABLE OPPORTUNITIES

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

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

Social Equity: There are no social equity opportunities associated with this report.

ACTION REQUESTED OF THE CITY COUNCIL

Staff Recommends that the City Council Adopt: (1) A Resolution Recommending To The Civil Service Board The Exemption Of The Classification Of Manager, Finance From The Operation Of Civil Service And (2) A Resolution Recommending To The Civil Service Board The Exemption Of The Classification Of Budget & Management Analyst, Principal From The Operation Of Civil Service And (3) An Ordinance Amending The Salary Schedule Of Ordinance No. 12187 C.M.S. ("Salary Ordinance") To Add the Title Of Manager, Finance; To Add The Title Of Budget & Management Analyst, Principal; To Add The Title Of Budget & Management Analyst, Senior; To Add The Title Of Budget & Management Analyst; And To Amend The Title Of Assistant Budget Analyst To Budget & Management Analyst, Assistant.

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May 8, 2018

For questions regarding this report, please contact Jaime Pritchett, Principal Human Resource Analyst, at (510) 238-4735.

Respectfully submitted,




IAN APPEYARD

Director, Human Resources Management

Prepared by: Jaime Pritchett
Principal Human Resource Analyst
Recruitment & Classification Division

FILED
OFFICE OF THE CITY CLERK
OAKLAND

OAKLAND CITY COUNCIL


City Attorney

18 APR 26 PM 3:30

RESOLUTION No. _____ C.M.S.

Introduced by Councilmember _____

RESOLUTION RECOMMENDING TO THE CIVIL SERVICE BOARD THE EXEMPTION OF THE CLASSIFICATION OF MANAGER, FINANCE FROM THE OPERATION OF CIVIL SERVICE

WHEREAS, the Oakland City Charter Section 902(f) requires that City Council recommend positions for exemption from Civil Service prior to Civil Service Board approval of such exemption; and

WHEREAS, the Manager, Finance classification is recommended for exemption from Civil Service due to its placement in the organization, lines of authority, reporting relationships within the department, as well as the position's duties, pay grade and independence of action; and

WHEREAS, the Manager, Finance is an expert level classification in the various financial fields including budget and finance, possessing advanced credentials, functioning as a consultant to department heads, the City Administrator, and professional and management staff; and

WHEREAS, the Manager, Finance is an executive manager with overall responsibility for budget and financial operations staff, is required to utilize a high degree of independence in carrying out the City Administrator's and City Council goals and objectives; the scope of responsibilities are broad and complex; the individual in this classification must deal with challenging, sensitive, and confidential matters; and assist management in complex labor negotiations costing; now, therefore be it

WHEREAS, the incumbent in the Manager, Finance position is expected to exercise considerable discretion in carrying out the City's mission for which there is a high consequence of error; now, therefore be it

RESOLVED, the City Council of the City of Oakland hereby recommends to the Civil Service Board that the classification of Manager, Finance be exempted from the requirements of civil service; and be it

FURTHER RESOLVED, that the Civil Service Board is hereby requested to approve such exemption

IN COUNCIL, OAKLAND, CALIFORNIA, _____

PASSED BY THE FOLLOWING VOTE:

AYES - BROOKS, CAMPBELL WASHINGTON, GALLO, GIBSON MCELHANEY, GUILLEN, KALB, KAPLAN,
AND PRESIDENT REID

NOES -

ABSENT -

ABSTENTION -

ATTEST: _____
LaTonda Simmons
City Clerk and Clerk of the Council
of the City of Oakland, California


City Attorney

OAKLAND CITY COUNCIL

FILED
OFFICE OF THE CITY CLERK
OAKLAND

18 APR 26 PM 3:51

RESOLUTION No. _____ C.M.S.

Introduced by Councilmember _____

RESOLUTION RECOMMENDING TO THE CIVIL SERVICE BOARD THE EXEMPTION OF THE CLASSIFICATION OF BUDGET & MANAGEMENT ANALYST, PRINCIPAL FROM THE OPERATION OF CIVIL SERVICE

WHEREAS, the Oakland City Charter Section 902(f) requires that City Council recommend positions for exemption from Civil Service prior to Civil Service Board approval of such exemption; and

WHEREAS, the Budget & Management Analyst, Principal classification is recommended for exemption from Civil Service due to its placement in the organization, lines of authority, reporting relationships within the department, as well as the position's duties, pay grade and independence of action; and

WHEREAS, the Budget & Management Analyst, Principal is a high-level and highly skilled classification in the field of budget and finance, functioning as a consultant to department heads and professional and management staff; and

WHEREAS, the Budget & Management Analyst, Principal is a supervisor with responsibility for day-to-day budget and financial operations staff, is required to utilize a high degree of independence in carrying out the City Administrator's and City Council goals and objectives; the scope of responsibilities are broad and complex; the individual in this classification must deal with challenging, sensitive, and confidential matters; and assist management in complex labor negotiations costing; now, therefore be it

WHEREAS, the incumbent in the Budget & Management Analyst, Principal position is expected to exercise considerable discretion in carrying out the City's mission for which there is a high consequence of error; now, therefore be it

RESOLVED, the City Council of the City of Oakland hereby recommends to the Civil Service Board that the classification of Budget & Management Analyst, Principal be exempted from the requirements of civil service; and be it

FURTHER RESOLVED, that the Civil Service Board is hereby requested to approve such exemption

IN COUNCIL, OAKLAND, CALIFORNIA, _____

PASSED BY THE FOLLOWING VOTE:

AYES - BROOKS, CAMPBELL WASHINGTON, GALLO, GIBSON MCELHANEY, GUILLEN, KALB, KAPLAN,
AND PRESIDENT REID

NOES -

ABSENT -

ABSTENTION -

ATTEST: _____

LaTonda Simmons
City Clerk and Clerk of the Council
of the City of Oakland, California