

**REPORT NO: 15 85**  
**DATE: 11/10/2015**  
**ANALYST: Michael Hebner**

**CLASSIFICATION REPORT**

**PROPOSED TITLE:** Assistant City Coordinator–Finance (Chief Finance Officer)

**CURRENT TITLE:** Assistant City Coordinator - Finance/ Chief Finance Officer

**INCUMBENT:** Vacant

**REASON FOR REQUEST:** Request to review an appointed position to determine the proper classification for the position

**DATE QUESTIONNAIRE SUBMITTED:** 11/10/2015

**DATE OF PREVIOUS STUDY:** N/A

**DISPOSITION OF PREVIOUS STUDY:** N/A

**PERSONS INTERVIEWED:** Desk Audit

**RECOMMENDATION:** Establish the position as Assistant City Coordinator Finance/ Chief Finance Officer (Grade 18, 833 points, Appointed)

The Assistant City Coordinator – Finance/Chief Finance Officer position is now vacant and we have been asked to review the factor ratings to ensure appropriate placement in the City’s system.

In reviewing historical data it has become clear that the position has not been credited properly for the number of positions that have come under its management control with the consolidation of Finance positons into a centralized department and the addition of the Property Services responsibility to the Finance Department.

The duties and responsibilities of the position are as follows:

- Provide executive level direction and management for the City’s Finance Department.

- Ensure the fiscal health of the City, including accounting, payroll, cash and revenue management, procurement, budgeting, debt management, management analysis, risk and claims management, financial operations, and utility billing.
- Responsible for all financial transactions of City departments, boards and agencies according to dictate of the City Charter, State Statutes and principles of sound financial management.
- Provide full disclosure of the financial position of all funds, appropriations and accounts of the City and its agencies.
- Manage all debt planning and issuance for the City and its agencies, consistent with adopted Debt Management Policies, and keep elected officials apprised of debt management issues.
- Ensure the financial aspects of all major economic development projects and programs are coordinated with City goals and interests.
- Oversee the planning and implementation of the City's facility maintenance and construction efforts, including public safety, security and wireless communications
- Represent the City on the Joint Debt Management Committee and the Investment Panel of the MERF Board.
- Provide leadership in relationships with the bond rating agencies and efforts to retain or improve the City's credit rating.

## **POSITION ANALYSIS**

### **PREREQUISITE KNOWLEDGE**

The position requires a Bachelor's Degree in Public Finance or a related field and five years of upper level management experience in a complex, decentralized government organization with a wide range of financial activities, including accounting, investments, debt management, budgeting and development finance. A Master's Degree is desirable. Preferred qualifications include a Certified Public Accountant (CPA) designation and/or Certified Public Finance Officer (CPFO) designation. The position requires excellent knowledge of governmental accounting and modern principles of finance administration, cost accounting, and budgeting. It requires outstanding management, analytical, and creative skills, and strong leadership skills. The position requires outstanding communications skills, both verbal and written, and the ability to work with wide variety of people. It requires strong decision making and problem solving skills.

The historical rating of **90 points** remains appropriate for the position and will be assigned.

### **DECISIONS AND ACTIONS**

A review of the rating demonstrates that the current rating of **90 points** is accurate in that the position is placed at the second highest score available in this category (only the Director of Public Works and City Coordinator are rated higher). Jobs at this level manage the operations of a major department with significant financial impact subject to statutory and legal limitations and oversight from elected officials. At this level work is highly complex and of broad variety, usually involving complex individual functions. Matters dealt with are of the broadest scope

and involve many complex and unusual problems. Performance has a great influence on finances or delivery of services; errors or inadequacies could do irreparable harm.

## **SUPERVISORY RESPONSIBILITY**

The 2015 Budget document for the Finance and Property Services Department reports that there are 251 full time equivalent employees in the department. Based on this number of employees under the management authority of the position a rating of **75 points** is appropriate and will be assigned.

## **RELATIONSHIPS RESPONSIBILITY**

A review of the rating demonstrates that the current rating of **85 points** on this factor is appropriate. Jobs at this level are highly placed executive level jobs in charge of major areas of responsibility where there are multiple contacts both internally and externally, primarily at a high level. Within the departments where they are assigned they typically direct the efforts of the department and/or divisions under their leadership. There is typically daily contact at a high-level advising City decision-making and providing leadership on policing and law enforcement, planning, housing, finance, development projects, efficient and effective land use, or other very important political and financial matters. At this level, jobs deal with legislative matters, budget concerns, and externally there are frequent contacts with neighborhood, regional, state and federal officials, and with various business associations representing persons interested in matters related to City business. At this level the incumbents would frequently be in contact with the highest level of City management including the City Coordinator, City Council Members, and the Mayor regarding various matters under their management. This level represents the City in a wide variety of forums and with a diverse clientele. Well developed and strong communication skills are required.

## **WORKING CONDITIONS**

The position will work in an office setting with exposure to the typical equipment such as computer keyboarding equipment, and phones. The position will spend time presenting to various groups and considerable time in meetings. A rating of **20 points** will be assigned.

## **EFFORT**

A review of the rating shows that the current rating of **80 points** remains appropriate for this factor. Jobs rated at this level are appointed high level executive department heads over large and complex departments where the effort is primarily mental effort in a broad range of planning, coordinating, organizing, implementing, monitoring, and delegating. These positions are leaders for budget decisions and are spokespersons for the departments they manage. All

of this high level authority and responsibility plays into the mental effort and stress required in the classifications. They work under a high degree of mental stress dealing with deadlines and meeting preparations, etc., and by virtue of the nature of the work, there is a constant need for attention to detail.

The position meets the criteria for appointed positions under the Minneapolis Code of Ordinance, Section 20.1010 as follows:

1. The person occupying the position must report to the head of the designated city department or the designated city department head's deputy.

The position is a department head

2. The person occupying the position must be part of the designated department head's management team

The position will lead a department and its management team

3. The duties of the position must involve significant discretion and substantial involvement in the development, interpretation, or implementation of city or department policy.

The duties of the position will involve significant discretion and involvement in the development and interpretation of City and department policy

4. The duties of the position must not primarily require technical expertise where continuity in the position would be significant.

Although the position requires extensive experience and knowledge of finance, strong leadership, strategic, and communication skills are critical as opposed to longevity in the job.

5. There is need for the person occupying the position to be accountable to, loyal to, and compatible with the Mayor, City Council, and the Department Head.

The person occupying this position will need to be accountable to, loyal to, and compatible with the City Coordinator, City Council, and Mayor

### **RECOMMENDATION:**

Establish the position as Assistant City Coordinator- Finance/Chief Finance Officer (Grade 18, 833 points, Appointed)

CLASSIFICATION FACTOR WORKSHEET								
Benchmark Classifications	Factors						Total Points	Grade Level
	1	2	3	4	5	6		
Assistant City Coordinator Finance/Chief Finance Officer (Current)	90	90	45	85	20	80	803	17
Executive Director CPED	90	90	70	85	20	80	835	18
Chief of Police	80	85	100	75	20	80	848	18
Director of Public Works	95	95	100	85	20	80	888	19
<b>PROPOSED CLASSIFICATION</b>								
Assistant City Coordinator Finance/Chief Finance Officer	90	90	75	85	20	80	833	18

1. Prerequisite Knowledge
2. Decisions and Actions
3. Supervisory Responsibility
4. Relationship Responsibility
5. Working Conditions
6. Effort

### EXEMPT

The position will be paid at more than minimum required \$455.00/week. The primary mission of the position will be management of the Finance and Property Services Department a customarily recognized department in the city government. The position will directly supervise more than two other full time employees. The person holding the position will have the authority to hire or fire other employees, or the their suggestions and recommendations as to the

hiring, firing, advancement, promotion or any other change of status of other employees will be given particular weight in the City's Service.

**ASSISTANT CITY COORDINATOR  
FINANCE OFFICER (APPOINTED)**

**CODE: C04330**

**REPORTS TO: City Coordinator**

**SUPERVISES: Deputy Finance Officer, Directors of functional areas including Property Services; Treasury; Purchasing; and Controller; and functions including Payroll, Cost and Fund Accounting, Financial Reporting, Budget, Financial Analysis, , Development Finance, Cash Management, Capital and Debt Management, and Risk and Claims Management**

**NATURE OF WORK**

**Serve as Finance Director for City Agencies and City Council Departments with responsibility for financial planning and management, budgeting, general accounting, cash management, procurement, risk management, financial operations, debt management, management analysis, pension planning and utility billing and oversee the City's facility maintenance and construction efforts**

**TYPICAL DUTIES AND RESPONSIBILITIES  
(Including, but not limited to the following)**

- Provide executive level direction and management for the City's Finance Department.
- Ensure the fiscal health of the City, including accounting, payroll, cash and revenue management, procurement, budgeting, debt management, management analysis, risk and claims management, financial operations, and utility billing.
- Responsible for all financial transactions of City departments, boards and agencies according to dictate of the City charter, State Statutes and principles of sound financial management.
- Provide full disclosure of the financial position of all funds, appropriations and accounts of the City and its agencies.
- Manage all debt planning and issuance for the City and its agencies, consistent with adopted debt Management Policies, and keep elected officials apprised of debt management issues.
- Ensure the financial aspects of all major economic development projects and programs are coordinated with City goals and interests.
- Oversee the planning and implementation of the City's facility maintenance and construction efforts, including public safety, security and wireless communications
- Represent the City on relevant pension plan issues and provide policy analysis and investment advice as required.
- Provide leadership in relationships with the bond rating agencies and efforts to retain or improve the City's credit rating.

**MINIMUM EDUCATION:** Bachelor's Degree in Public Finance or a related field

**MINIMUM EXPERIENCE:** Five years of upper level management experience in a complex, decentralized government organization with a wide range of financial activities; including accounting, investments, debt management, budgeting and development finance

**LICENSES/CERTIFICATIONS:** N/A

**OTHER SPECIFICATIONS**

- Certified Public Accountant designation or Certified Finance Officer, or Finance Specialization highly desirable.
- MBA desirable.
- Excellent knowledge of governmental and cost accounting and budgeting procedures.
- Excellent knowledge of modern principles of finance administrative.
- Excellent knowledge of administrative and management techniques.
- Excellent knowledge of the various City Departments and various agencies functions, policies, practices and procedures.
- Excellent leadership, management, analytical and creative skills.
- Excellent decision making and problem solving skills.
- Skill and attitude to motivate and help others embrace and adapt to change.
- Ability to multi-task.
- Ability to form effective working relationships with a wide variety of people.
- Computer skills necessary to use the City's Financial System and Microsoft Office applications.
- Excellent oral and written communication skills.
- Excellent presentation and report writing skills.

**WORKING CONTIDITIONS:** Normal

<b>SERVICE:</b>	<b>APPOINTED</b>
<b>GRADE:</b>	<b>18 (833 Total Points) Executive Exemption</b>
<b>ESTABLISHED:</b>	<b>STATE LEGISLATIVE ACTION</b>
<b>JOB SPEC:</b>	<b>November 2015</b>

**CITY OF MINNEAPOLIS**