

OPERATING BUDGET

FISCAL YEAR

2017

**CAPITAL IMPROVEMENT
PLAN**

**PREPARATION
MANUAL**



**DALLAS COUNTY
Office of Budget and
Evaluation**

TABLE OF CONTENTS



| | PAGE |
|--|-------------|
| I. INTRODUCTION | 1 |
| II. FY2017 BUDGET SCHEDULE | 2 |
| III. PREPARATION INSTRUCTIONS - OPERATING BUDGET | 3 |
| Form A. Request for Overtime Budget | 4 |
| Form B. Request for Extra Help Budget | 6 |
| Form C. Request for Professional Services Budget | 8 |
| Form D. Request for Replacement Equipment..... | 10 |
| Form E. Program Improvement Request - Reclassification..... | 12 |
| Form F. Program Improvement Request - Capital, Equip., Renovation, Misc..... | 14 |
| Form G. Program Improvement Request - Computer Hardware/Software | 16 |
| Form H. Long Term Capital Needs Preview | 18 |
| IV. APPENDIX - SUPPLEMENTARY MATERIAL | 21 |
| Appendix A - Price List: | |
| A-1: Salary Schedules | 25 |
| A-2: Office Furniture Price List | 26 |
| A-3: Standard Furniture Guidelines | 28 |
| A-4: Office Machine Price List | 29 |
| A-5: Communication Equipment Price List..... | 30 |
| A-6: Vehicle Price List..... | 31 |
| A-7: Maintenance Price List..... | 32 |
| A-8: Computer Configurations and Prices | 33 |
| Appendix B: Charting the Path: A Strategic Plan for Dallas County | 35 |
| Appendix C: Personnel/Civil Service Examples and Form..... | 42 |
| Appendix D: Budget Analyst Assignments | 53 |

I. INTRODUCTION

This document contains guidance to departments in the preparation of their requests for resources for the fiscal year which begins on October 1, 2016 (“FY2017”). The document is organized around the required and optional forms that should be submitted to the Office of Budget and Evaluation by **March 14, 2016**. Section II contains the entire schedule for the FY2017 budget, culminating in budget and tax rate adoption on **September 20, 2016**.

Assistance - the Office of Budget and Evaluation is available to assist any department with the preparation of budget requests. A listing of Budget Analysts, their respective departments and their contact information can be found in Appendix D to this document.

II. FY2017 BUDGET SCHEDULE

| | |
|--|--|
| March 14, 2016 | Budget Forms Due To Office of Budget and Evaluation |
| March | Departmental Request Reports Issued by Office of Budget & Evaluation |
| April | Revised Requests Submitted to Office of Budget & Evaluation as Needed |
| May - June - July | Analysis of Requests by Office of Budget and Evaluation and other Staff Departments |
| July 15, 2016 | Baseline Budget Published and Distributed to Commissioners Court |
| July 25, 2016 | Certified Tax Roll Received |
| July, August Commissioners Court Meetings | Budget Hearings/Workshops |
| August | Final Decisions on Programs |
| August 23 – September 6 | Public Hearing on Tax Rate |
| September 20, 2016 | Tax Rate Set; Public Hearing on Budget/Budget Adoption; Tax Rate Adoption |
| October 1, 2016 | Fiscal Year 2017 Begins |

III. PREPARATION INSTRUCTIONS

Which departments should submit forms?

The included forms are optional for all County Departments and should be submitted only if overtime, extra help, replacement equipment, or new program resources are requested. Commissioners Court will be focusing efforts on finding funding to increase the compensation of positions to the Market, as outlined by the Dallas County Hay Study. Therefore, we ask that departments take this into consideration as requests are prepared and submitted. We are also not including a new position request form, as Commissioners Court is only considering new position requests that are mandated by law or emergency requests. If a department needs to request a new position, please contact Budget Officer Ryan Brown at 214-653-6384 for a new position form.

Departments are not required to submit any attached forms. If a department chooses not to submit, please notify the assigned budget analyst as soon as possible.

When should the forms be submitted?

Budget materials should be submitted to the Office of Budget and Evaluation by **Monday, March 14, 2016.**

How should the forms be submitted?

- Information should be typed into the forms included in this document and emailed to the Department's assigned Budget Analyst.
- Forms are available from the Office of Budget and Evaluation website and at <http://www.dallascounty.org/department/budget/media/BudgetManual.pdf>. **Departments are encouraged to submit forms electronically as an e-mail attachment.**

Form A - Request for Overtime/Compensatory Time Budget

Purpose

To provide detailed information justifying overtime and compensatory time funding requested for FY2017.

Instructions

- *Overtime/Compensatory time should only be requested for nonexempt positions (positions eligible for overtime).*
 - *Utilizing compensatory time off is preferred in lieu of overtime pay.*
 - *Requests must include a listing of each position expected to be assigned overtime and a detailed justification on why the overtime/compensatory time is needed.*
-
- **Description of Function** - departmental function/section for which overtime/compensatory time is requested. Submit one Form A for each separate overtime/compensatory time function.
 - **Position Title and Grade** - information related to the full-time position that will be required to work overtime or accrue compensatory time.
 - **Hours** - the number of hours for which overtime/compensatory time funding is requested.
 - **Rate** - the current hourly overtime (time and a half) rate of the position for which overtime funding is requested.
 - **Total** - the calculation of the number of hours multiplied by the hourly rate.
 - **Comments and Justification** - detailed justification for requesting overtime/compensatory time. The justification should address how the request for overtime/compensatory time implements the visions listed in the County's Strategic Plan. This narrative should also include what the employee will be doing, when will they be doing it and why overtime is needed rather than extra help, comp-time or normal work hours. As an example, the Sheriff's Department requests overtime for Texas/OU weekend (a predictable event) for additional personnel to manage and process inmates in mass arrest situations for Friday and Saturday (quantified time). A plan for controlling compensatory time accrual should also be addressed in this section.

REQUEST FOR OVERTIME/COMPENSATORY TIME BUDGET

| Department _____ | | Budget No. _____ | | |
|---------------------------------|----------|------------------|-------|----------------------------|
| Description of Function _____ | | | | |
| Position Title and Grade | Overtime | | | Comments and Justification |
| | Hours | Rate | Total | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
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| | | | | |
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| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total | | | | |
| Staff Review and Comment | | | | |
| | | | | |

Form A

FY2017

Form B - Request for Extra Help Budget

Purpose

To identify programs in the department where part-time positions are utilized and calculate the estimated cost.

Instructions

- **Description of Function** - narrative of the function for which extra help is requested. This description should identify what division/program (Administration, Passports, and Admissions/Release) is requesting extra help funding and give a brief job description. Submit a separate Form B for each function.
- **Position Title, Grade, and Number** - the functional title of the part-time positions (Clerk, Secretary, and Admissions Coordinator), the grade of the positions, and the currently authorized position numbers (filled and vacant) performing the functions described.
- **Hours** - the anticipated annual number of hours needed. The number of hours for each position number should be estimated. Several positions expected to be utilized for the same number of hours can be combined.
- **Rate** - the current hourly rate for the requested position. This should be submitted as the minimum hourly rate for the grade in which the position is performing. Salaries are located in Appendix A-1.
- **Total** - the calculation of the number of hours multiplied by the hourly rate.
- **Retirement Benefits** - designation of the position as participating in the Texas County and District Retirement System or the Public Agency Retirement System (PARS). All permanent full time and part time employees should be designated as TCDRS participants. All temporary full time and part time employees should be designated as PARS participants. Temporary employees are those employed for a limited time generally not to exceed six months.
- **Comments and Justification** - reasons for requesting extra help. The justification should address how the request for Extra help implements the visions listed in the County's Strategic Plan. Justification should also include workload indicators that are addressed by the part-time positions. An example would be the District Clerk's use of part-time positions used during the peak months of January through August to process passports at the North Dallas office.

REQUEST FOR EXTRA HELP BUDGET

| Department _____ | | Budget No. _____ | | | |
|----------------------------------|--------------|------------------|-------|---------------------|----------------------------|
| Description of Function | | | | | |
| | | | | | |
| Position Title, Grade and Number | Annual Hours | Hourly Rate | Total | Retirement Benefits | Comments and Justification |
| | | | | | |
| Total | | | | | |
| Staff Review and Comment | | | | | |
| | | | | | |

Form B

FY2017

Form C - Request for Professional Services Budget

Purpose

The purposes of this form are (a) to describe uses of professional service expenditure (expense code 05590-Other Professional Fees), and (b) to request additional funding for process improvement studies.

Instructions

■ **Description of Services** - briefly describe the service the County receives from the provider/contractor. Examples include: microfilming of court records, off-site record storage, and private laboratory testing.

■ **FY2016 Budget and FY2017 Request** - list amount of funding for the service approved in the FY2016 budget and the anticipated amount needed to continue current operations in FY2017.

■ **Process Improvement Consulting Request** - if you are requesting funding for expert consultation with respect to process improvement or revenue maximization, describe the detailed nature of the request, the expected benefits, and estimated cost.

■ **Strategic Plan** - explain how the request implements the visions listed in the County's Strategic Plan.

REQUEST FOR PROFESSIONAL SERVICES

Department _____

Budget No. _____

| Pay To | Description of Services | FY2016 Budget | FY2017 Amount Requested |
|--------|-------------------------|------------------|-------------------------------|
| | | | |

Process Improvement Consulting Request

FORM C

FY 2017

Form D - Request for Replacement Equipment

Purpose

To request replacement of current property items for FY2017. This form should not be used for major upgrade of equipment or for replacement of computer equipment.

Request for replacement should be submitted to the Office of Budget and Evaluation. The Office of Budget and Evaluation will send the request to the reviewing department

Recommendation will be provided by the departments shown below:

| TYPE | REVIEWING DEPARTMENT |
|---|---------------------------------------|
| File cabinets and other storage devices | Central Services - Records Management |
| Office and FAX machines | Central Services - Records Management |
| Copiers | Purchasing |
| Vehicles | Central Services - ASC |
| Other | Office of Budget and Evaluation |

Instructions

- **Priority** - list items in general priority order.
- **Item** - brief description.
- **Age** - the age of the item to be replaced.
- **Property Number** - the serial number or County property number.
- **Estimated Cost of Replacement** - the estimated cost of the replacement item. Use the Price List tables in Appendix A of this manual to determine the cost of replacement items, where applicable.
- **Comments/Justification** - a justification for replacement, e.g., “item is broken and more costly to repair”.

REPLACEMENT EQUIPMENT REQUEST

| Department _____ | | Budget No. _____ | | | |
|------------------|---------------------|------------------|-----------------|-------------------------------|------------------------|
| Priority | Item to be Replaced | Age (years) | Property Number | Estimated Cost of Replacement | Comments/Justification |
| 1 | | | | | |
| 2 | | | | | |
| 3 | | | | | |
| 4 | | | | | |
| 5 | | | | | |
| 6 | | | | | |
| 7 | | | | | |
| 8 | | | | | |
| 9 | | | | | |
| 10 | | | | | |

Form D

Form E - Program Improvement Request –

Reclassification

Purpose

To request consideration for reclassification of staff within your department if certain conditions apply (see below).

Reclassification - (or “job study”) results whenever a job being performed no longer matches the job description which was used to originally classify the job. Furthermore, such mismatch between *actual work* and *job description* must be the result of external factors and not a result of internal reorganization. That is, reassigning tasks within a department (unless approved in advance by Commissioners Court) does NOT constitute grounds for reclassification.

Instructions

- Submit one Form F for each position category for which a job study is requested.
- Attach a current approved job description.
- Attach a completed Position Description Reclassification Request Form located in Appendix C page 49.
- Attach an organizational chart outlining the reporting relationship of the position(s) up to the director/elected official level (see example on Appendix C).
- Contact the Human Resources/Civil Service Department (ext. 6067) for assistance, if needed, on the above.
- **Description of Changes in Work Being Performed** - detail the specific job duties the position is performing as compared to the position’s actual job description.
- **Reason/Authority for Change** - a reclassification is typically related to mandated changes in complexity, rather than change in volume. For example, a supervisor whose staff has increased in size would not normally qualify for a reclassification solely as a result of the change in the number of individuals supervised.

To complete the PIR-Reclassification, in addition to a description of the changes, the department must carefully describe the reason that a job description has changed.

PROGRAM IMPROVEMENT REQUEST RECLASSIFICATION

| | |
|-----------------------------|----------------------------------|
| Department _____ | Budget No. _____ |
| Position Title _____ | Position No. _____ |
| Current Grade _____ | Job Code _____ |
| | Department Priority _____ |

Description of Changes in Work Being Performed

Reason/Authority for Change (see Budget Manual)

Departmental Cost Worksheet

| | | |
|--------------------|--------------------|---------------------|
| Current Grade | Proposed Grade | |
| Salary | Salary | |
| FICA (7.65%) | FICA (7.65%) | |
| Retirement (11.5%) | Retirement (11.5%) | |
| Total | Total | |
| | | Total Annual Impact |

Staff Review and Comment

Form F - Program Improvement Request - Capital, Equipment, Renovation, Miscellaneous

Purpose

To request any new (rather than replacement) resources other than full-time staff additions or computer hardware/software.

NOTE: Do not use this form for computers, hardware, or software. For these purposes, use Form G, "PIR - Computer Hardware/Software". Use Form D "Replacement Equipment Request" when requesting replacement equipment.

Instructions

- **Estimated Cost** - approximate cost of equipment, service, or renovation. Equipment prices are provided in Appendix A. The Purchasing Department will provide estimates for those items not listed. Facilities Management will assist departments in estimating the costs associated with facility modifications.
- **Brief Summary of Request** - short description of resources being requested. Below are some *examples*:
 - Ultra-low Temperature Freezer for Laboratory,
 - Reconfiguration of office space,
 - Requests for copiers, pagers, furniture, etc.
- **Discussion of Need, etc.** - describe in detail the need and justification of the requested items with cost information described as accurately as possible. Please make sure to address how this request implements the County's Strategic Plan. Attach any backup material that you think may be helpful in evaluating the cost/benefit value of the new item. If any annual costs will result from the requested item (e.g., staff to operate it, insurance, repair costs, etc.), provide an estimate of this cost.

Form G - Program Improvement Request - Computer Hardware/Software

Purpose

To provide IT Services with sufficient information on computer-related requests to make a determination concerning replacement or new computer hardware/software.

Instructions

- **Request Type** - for the FY2017 budget submission process, there are three types of requests: (1) new hardware, (2) replacement hardware, and (3) P.C. packaged software products. Please note all of the types that apply to your request.
 - H Request for new mainframe and P.C. hardware
 - R Request for replacement mainframe and P.C. hardware
 - S Request for P.C. packaged software products (spreadsheets, data base, word processing, etc.)
- **PIR Number** - a tracking number to be assigned by IT Services.
- **Possible Funding Source** - provide alternative funding, if any, for this request.
- **Description of Need and Justification** - describe the hardware and software you are requesting along with its intended purpose. Please be sure to use sufficient detail and indicate how this request implements the County's Strategic Plan.
- **Expected Benefits** - the benefits you expect to realize from your requested hardware/software must be clearly documented. The expected benefits should include cost savings, increased productivity, increased public service, mandates, etc.
- **Department Head Signature, etc.** - each request should be signed and prioritized by the department head. Include a contact name and telephone number in case additional information is needed.
- **Scoring** - this section will be used by IT Services in evaluating the request.

PROGRAM IMPROVEMENT REQUEST COMPUTER HARDWARE AND SOFTWARE

| | |
|---------------------------|--|
| Department _____ | Budget No. _____ |
| Title of PIR _____ | Request Type _____ |
| PIR # _____ | (assigned by Data Services) Possible Funding Source _____ |

Description of Need and Justification

Expected Benefits

| | |
|---|------------------------------|
| Department Head Signature _____ | Priority _____ |
| Department Contact Person _____ | Phone _____ |
| Received by Office of Budget and Evaluation _____ | Rec'd by Data Services _____ |

Scoring

| | |
|-----------------------------|------------------------------------|
| Cost Savings _____ | Improved Management Controls _____ |
| Cost Avoidance _____ | Multi-Use Systems _____ |
| Legal Requirements _____ | Cost Recapture _____ |
| Service to the Public _____ | Critical System Upgrade _____ |

| | |
|---------------|---------------|
| Form H | FY2017 |
|---------------|---------------|

Form H - Long Term Capital Needs Preview

Purpose

The purpose of this form is to provide a format for discussing capital needs for years that follow FY2017.

Instructions

Generally a five year planning horizon should be considered. Provide as much detail as possible on potential needs in FY2017 through FY2022. Cost estimates, if available, should be provided, along with requests for architectural studies or related planning expenses that will be required.

The estimated impact on operating expenses should be carefully considered. For example, if a new facility will require additional staff, an estimate of this cost should be included. Also address how these needs implement the County's Strategic Plan.

Where possible, planning staff from the Assistant Court Administrator for Operations should be consulted in the preparation of this form.

Examples

- Office space expansion/renovation.
- Additional sub-courthouses or clinics.
- Large laboratory equipment replacement.
- Additional jail space.



IV. APPENDIX: SUPPLEMENTARY MATERIALS



APPENDIX A - PRICE LIST



A-1
**ANNUAL SALARIES FOR USE IN ASSIGNING
 COSTS TO STAFF PIR'S**

(Does not include fringe benefits. Based on FY2016 Salary Schedule.)

| Non-Exempt | | Exempt | | Social Services | | Exempt Technical | |
|-----------------|---|--------|----------|-----------------|----------|------------------|-----------|
| Grade | Salary | Grade | Salary | Grade | Salary | Grade | Salary |
| 01 | \$23,379 | A | \$41,800 | AA | \$36,670 | AM | \$44,293 |
| 02 | \$24,544 | B | \$44,344 | BB | \$38,709 | BM | \$46,812 |
| 03 | \$25,834 | C | \$46,430 | CC | \$40,893 | CM | \$48,927 |
| 04 | \$27,290 | D | \$49,306 | DD | \$43,160 | DM | \$51,739 |
| 05 | \$29,390 | E | \$51,614 | EE | \$45,531 | EM | \$54,000 |
| 06 | \$31,720 | F | \$54,364 | FF | \$47,796 | FM | \$56,718 |
| 07 | \$33,592 | G | \$58,678 | GG | \$51,230 | GM | \$60,922 |
| 08 | \$36,275 | H | \$63,198 | | | HM | \$65,922 |
| 09 | \$39,107 | I | \$68,287 | | | IM | \$70,372 |
| 10 | \$41,787 | J | \$74,213 | | | JM | \$76,172 |
| | | K | \$79,523 | | | KM | \$81,403 |
| | | | | | | | |
| Law Enforcement | | | | | | Attorneys | |
| Grade | Title | | Salary | | | Grade | Salary |
| 40 | Detention Service Officer | | \$41,954 | | | 01 | \$63,995 |
| 66 | Sheriff Deputy/Deputy Constable | | \$54,059 | | | 02 | \$70,459 |
| 68 | Sheriff Senior Sergeant /Constable Senior | | \$62,142 | | | 03 | \$77,500 |
| 69 | Sheriff Lieutenant/Constable Chief Deputy | | \$71,481 | | | 04 | \$91,904 |
| 70 | Sheriff Captain | | \$82,204 | | | 05 | \$109,481 |
| | | | | | | 06 | \$124,767 |
| | | | | | | 07 | \$142,530 |
| | | | | | | 08 | \$156,782 |

Note: Please contact the Office of Budget and Evaluation for annual salaries of grades that are not listed.

A-2

OFFICE FURNITURE PRICE LIST

Please request a copy of the catalog from the Purchasing Department for additional items or to view items as listed

Updated January 2016

FY2017

Estimate

DESKS & CREDENZAS

| | |
|--|-------|
| Administrative Double Pedestal 3/2 72W x 36" D Desk (HON 10799) | \$782 |
| Credenza w/KneeSpace 72" W x 24" D (HON 10741) | \$674 |
| Administrative Double Pedestal 3/2 66" W x 30" D Desk (HON 10774) | \$754 |
| Administrative Double Pedestal 3/2 60" W x 30" D Desk (HON 10773) | \$717 |
| Administrative Single Pedestal Right B/B/F 66" W x 30"D 29-1/2H (HON 10701R) | \$620 |
| Administrative Flush Ht Return Right F/F 48" W x 24" D 29-1/2H (HON 10711R) | \$415 |
| Metal desk 30" D x 60" W 2/2 Pedestal Desk (HON 38155) | \$601 |
| Metal desk 30" D x 66" W -2R w/lock single Pedestal Desk w/return (HON 38291R) | \$576 |
| Metal desk 24" D x 48" W x 29-1/2 H 2L w/lock Flush Rtn (HON 38216L) | \$378 |

CHAIRS

| | |
|--|---------|
| Judicial bench chair Ex High Back Mid-Range Knee-1 (HON 6541) | \$659 |
| Executive, high-back chair Swivel Tilt Arms- Pillowsoft (HON2091) | \$257 |
| Administration Mgr/Task Asynchronous w/Arm Seat Glide, (HON 7808) | \$356 |
| Side-arm chair Guest Sled base All-Wood arms (HON 2903) | \$268 |
| Guest Chair Pillow- Soft (Series 2190) 4-Leg Frame (HON 2194) | \$291 |
| Guest stacker 4030 Series Chair Text Seat & Back Set of 4 (HON 4031) | \$2,325 |
| Ignition Wk Mid-bck Pneu Syn tilt Bck Tilt Ten Seat (HON HIWM8) | \$544 |
| Steel folding chair padded/4 per carton (HFC02) | \$101 |

BOOKCASES

| | |
|---|-------|
| 36" w X 13 1/8" d X 29 1/2" h - 2 shelves (HON 10752) | \$232 |
| 36" w X 13 1/8" d X 43 3/8"h - 3 shelves (HON 10753) | \$282 |
| 36" w X 13 1/8" d X 57 1/8" h - 4 shelves (HON 10754) | \$319 |
| 36" w X 13 1/8" d X 71"h - 5 shelves (HON 10755) | \$380 |
| 36"w X 12" d X 84"h - 6 shelves (HON 1897) | \$204 |

FILE CABINETS

Lateral, locking file, metal, 36" w, with shelves:

| | |
|---------------------|-------|
| 2-drawer (HON 752L) | \$433 |
| 3-drawer (HON 753L) | \$575 |
| 4-drawer (HON 754L) | \$730 |
| 5-drawer (HON 755L) | \$950 |

Lateral, locking file, metal, 36" w, with drawers:

| | |
|---|--------------|
| 2-drawer (HON 782L) | \$329 |
| 3-drawer (HON 783L) | \$466 |
| 4-drawer (HON 784L) | \$574 |
| 5-drawer (HON 785L) | \$758 |
| Vertical, letter size, locking, metal: | |
| 2-drawer (HON 312P) | \$170 |
| 4-drawer (HON 314P) | \$231 |
| 5-drawer (HON 315P) | \$339 |
| Vertical, legal size, locking, metal: | |
| 2-drawer (HON 312CP) | \$204 |
| 4-drawer (HON 314CP) | \$268 |
| 5-drawer (HON 315CP) | \$383 |
| Storage Cabinet, 36" w X 18" d X 72" h (HON SC1872) | \$348 |
| Storage Cabinet, 36" w X 18" d X 42" h (HON SC1842) | \$294 |

TABLES

Round Conference Tables with Base

| | |
|---|--------------|
| 36" HTLD36 – Preside 36" round Shaped Laminate Top | \$167 |
| 36" HTLR36 – Preside Laminate Cylinder base for 36" Top | \$250 |
| 42" HTLD42 – Preside Round Shaped Laminate Top | \$181 |
| 42" HTLR42 – Preside Laminate Cylinder base for 42" Top | \$250 |
| 48" HTLD48 – Preside 48" Round Shaped Laminate Top | \$200 |
| 48" HTLR48 – Preside Laminate Cylinder base for 48" Top | \$276 |

Conference Room Tables

| | |
|---|--------------|
| Preside 72W x 36D Racetrack Shaped Laminate Top (HON HTLA 3672) | \$235 |
| Preside 96W x 48D Racetrack Shaped Laminate Top (HON HTLA 4896) | \$334 |
| Preside Laminate Cylinder Base For 96" W Table Tops (HON HTLR 96) | \$551 |
| Preside 120W x 48D Racetrack Shaped Laminate Top (HON HTLA 48120) | \$414 |
| Preside Laminate Cylinder Base For 120" W Table Tops (HON HTLR 120) | \$647 |
| Preside 144W x 48D Racetrack Shaped Laminate Top (HON HTLA 48144) | \$463 |
| Preside Laminate Cylinder Base for 144W Table Tops (HON HTLR 144) | \$672 |
| Computer Table (HON ED3036G) | \$195 |

Mobile PC Stations (varies) - *Please call Purchasing for quote*

A-3

STANDARD FURNITURE GUIDELINES

| | <u>Desk & Chairs</u> | <u>Files</u> | <u>Bookcase</u> | <u>Table</u> |
|--|---|--------------|-----------------|---------------------------------------|
| Elected Officials Department Heads | 36" X 72" desk 1 desk chair 1 credenza 2 side chairs | as needed | 3-5 shelves | 36" X 72" Conference w/6 chairs |
| Assistant Directors Chief Deputy | 36" X 72" desk 1 desk chair 1 credenza 2 side chairs | as needed | 3-5 shelves | |
| Analysts Admin. Assistants Coordinators Masters Referees Asst. Chief Deputy Professional | 30" X 60" desk 1 desk chair 1 side chair | as needed | 3-5 shelves | |
| Secretary Court Reporter Chief Clerk | 48" X 66" desk 1 secretary chair | as needed | | |
| Clerk Receptionist | 48" X 66" desk w/typing return 1 secretary chair | as needed | | |
| Conference Room | 120" X 48" table w/10 chairs | | | |

A-4
OFFICE MACHINE PRICE LIST
As of January 2016
(Please see Appendix A-8 for computer equipment prices)

| | <u>FY2017</u> |
|---|------------------------|
| | <u>Estimate</u> |
| <u>A. COPIERS</u> | |
| Low Volume | \$85 - 96 |
| Medium Volume | \$148 - 188 |
| High Volume | \$235 - 262 |
| | |
| <u>B. FAX MACHINES</u> | |
| Low Volume - Brothers MFC8220 | \$459 |
| Mid Volume, Muratec - F525 | \$1,285 |
| High Volume, Muratex - F565 | \$1,597 |
| | |
| <u>B. COURT REPORTING/DICATION EQUIPMENT</u> | \$600 - 1,500 |
| | |
| <u>D. TIME STAMP/CLOCKS WITH NAME PLATES</u> | \$700 - 800 |
| | |
| <u>E. SHREDDERS</u> | |
| Destroyit # 2240CC | \$381 |
| Destroyit # 2260CC | \$437 |
| Destroyit # 2360CC | \$698 |
| Destroyit # 2404CC | \$988 |
| Destroyit # 2503CC | \$1,270 |

A-5
COMMUNICATION EQUIPMENT PRICE LIST
As of January 2016

| | <u>FY2017</u> <u>Estimate</u> |
|--|--|
| <u>A. MOBILE RADIO</u> | |
| 150 MHz 110 watt | \$1,500 |
| 150 MHz 50 watt | \$700 |
| <u>B. PORTABLE RADIO</u> | |
| 150 MHZ with battery, belt carrier and charger | \$900 |
| 800 MHZ with battery, belt carrier and charger (Bailiffs, Security, Detentions only) | \$2,500 |
| <u>B. CELLULAR PHONES</u> | |
| Basic plan – Heavy Usage | \$840/year |
| Car adapter | \$25 |

Any plan above basic needs to be submitted for justification and tailoring as there are a variety of plans available.

A-6
VEHICLE PRICE LIST
 As of January 2016

| <u>A. AUTOMOBILES</u> | <u>FY2017</u> |
|---|------------------------|
| | <u>Estimate</u> |
| Sedan, 4-door, mid-size, non-police | \$22,100 |
| Sedan, 4-door, full-size, police package | \$27,750 |
| Sedan, 4-door, full-size, Fugitive, Police package | \$28,500 |
| Sedan, 4-door, full-size, Administrative | \$27,200 |
| | |
| <u>B. TRUCKS</u> | |
| Pickup, 2-wheel drive, ½ ton, (S-10, Ranger or similar) | \$22,150 |
| Full Size Pickup, ½ ton, heavy duty | \$24,450 |
| Full Size Pickup, ¾ ton, heavy duty | \$26,200 |
| Full Size Pickup, ¾ ton, heavy duty – Diesel | \$31,250 |
| Full Size Pickup, 1 ton, heavy duty | \$32,700 |
| Full Size Pickup, 1.5 ton, heavy duty | \$37,500 |
| Full Size Pickup, 1.5 ton, Crew Cab, heavy duty | \$41,350 |
| Full Size Pickup, Crew Cab, ¾ ton, heavy duty | \$35,400 |
| Full Size Pickup, Crew Cab, 1 ton, heavy duty | \$37,350 |
| Suburban, ¾ ton, 2-wheel drive | \$45,200 |
| 2-wheel drive, SUV, 2-door (Explorer/Blazer or similar) | \$35,575 |
| 2-wheel drive, SUV, 4-door (Explorer/Blazer or similar) | \$33,625 |
| | |
| <u>C. VANS</u> | |
| Non-law enforcement, ¾ ton cargo | \$27,350 |
| Non-law enforcement, 1 ton cargo | \$32,250 |
| Non-law enforcement, 15 passenger | \$34,495 |
| Non-law enforcement, 15 passenger, diesel | \$36,475 |
| Law enforcement, 1 ton, 15 passenger w/460 cu. in. engine, gasoline | \$34,100 |
| Law enforcement, 1 ton, super cargo | 34995 |
| Mini-van, 7 passenger | \$25,200 |
| Mini-van, cargo | \$24,250 |

A-8
Computer Configurations and Prices
As of January 2016

The following prices are estimates only for planning purposes. All prices are subject to change at any time by the vendors and/or the State of Texas. SCT/IT Services will generate detailed quotes for all computer related hardware and software at the time the requisition is place. Pricing for desktops and laptops includes the added cost of MS Office licenses that need to be purchased separately.

| <u>Device</u> | <u>Cost</u> |
|---|-------------|
| Standard Desktop Computer | \$700 |
| Laptops with case and monitor | \$1,610 |
| iPads with AppleCare | \$770 |
| Printers: | |
| Local + Network (B/W Light to Medium use) | \$360 |
| Local + Network (CLR Light to Medium use) | \$640 |
| Network (Heavy Use) | \$1,520 |



Appendix B

Charting the Path: A Strategic Plan for Dallas County

CHARTING THE PATH

MAJOR ELEMENTS OF DALLAS COUNTY'S STRATEGIC PLAN 2007-2017

The strategic plan for Dallas County establishes five goals —visions— that the County will pursue over the next ten years. These visions and the strategies by which they can be implemented are as follows:

Vision 1: Dallas County is a model interagency partner.

Strategies: Commissioners Court provides leadership and establishes a vision for Dallas County.

Elected officials reach consensus on roles, responsibilities and functions of Dallas County government.

Vision 2: Dallas County is a healthy community.

Strategies: Provide disease prevention, health promotion and human service programs to County residents.

Network with County cities and regional partners to increase operational efficiency.

Support a regional indigent medical and mental healthcare network.

Vision 3: Dallas County is safe, secure and prepared.

Strategies: Synergize public safety programs and services across the County.

Coordinate programs and systems to reduce crime.

Implement a county-wide emergency response plan.

Maximize effectiveness of County's criminal justice resources.

Vision 4: Dallas County proactively addresses critical regional issues.

Strategies: Implement programs and conduct activities to address Dallas County Air quality

Implement programs and conduct services to address Dallas County Transportation

Vision 5: Dallas County is the destination of choice for residents and businesses.

Strategies: Improve/maintain Dallas County as a driver of economic development.

Partner with cities, local chambers of commerce and economic development organizations to conduct a coordinated economic development plan.

Coordinate/undertake programs and services to improve Dallas County quality of life.

As the County implements these visions and strategies, its role will be, depending upon the vision/strategy, either that of:

- A **Traditional Service Provider** whereby the County ensures the maintenance and delivery of services to its stakeholders;
- A **Leader** whereby the County assumes a pro-active leadership position on key issues which affect the North Central Texas region;
- A **Convener** whereby the County facilitates discussions with cities, community groups, state government and other counties and entities on key issues; and/or
- An **Architect** whereby the County conducts innovative activities which distinguish the County and the region.

A number of activities related to each vision have been identified. The implementation of these activities will serve as an “indicator” that the County is pursuing the visions contained in this plan.

Vision 1 Indicators

- Clearly define and develop consensus on the roles and responsibilities of the Commissioners Court.
- Publish an annual report on the implementation of the strategic plan.
- Prioritize mission-critical, statutory, and mandated programs and services.
- Represent County on state, regional and local committees.
- Adopt a clear, concise and unified mission statement.
- Achieve consensus with stakeholders on the roles and responsibilities of the County.
- Clearly articulate County’s role and responsibilities to the public.
- Use operational procedures to manage the Commissioners Court’s meetings and external dialogue.
- Assess and stream-line County workforce for efficiency and operation.
- Develop a ten-year forecast that identifies revenue threats and opportunities.
- Adopt customer-friendly rules and policies.
- Provide mission-critical programs and services to public.
- Synchronize and align data collection and storage procedures across County governmental entities.
- Increase e-business capacity across County offices and departments.
- Use innovation and modified procedures to increase accuracy and efficiency in the billing and collection of County fees, fines and taxes.
- Maintain County facilities and information systems.
- Implement incentive-based compensation plan to motivate and reward employee performance and loyalty.

Vision 2 Indicators

- Benchmark County public health indicators against similarly-sized metropolitan areas.
- Map communicable disease morbidity for use in operation of prevention and treatment programs.
- Assess child and adult public health care programs in highly impacted areas.
- Develop consensus among community for clear definition of “public health.”
- Assess current and future public health issues/trends which impact disease trends and develop a response plan.
- Promote healthy living and wellness programs across the County.
- Identify opportunities to collaborate or consolidate public health programs with cities, community organizations and governmental entities.
- Establish partnerships with community organizations and governmental entities to identify critical health issues and to develop a region-specific action plan.
- Map community-based health resources with needs and identify gaps in service delivery and utilization.
- Convene community organizations, cities and other partners to develop a regional health plan.
- Work with Parkland Hospital to maximize the use of its facilities and resources.
- Convene local and regional partners to implement key items of the Parkland Blue Ribbon Commission.

Vision 3 Indicators

- Develop common definition of “public safety.”
- Identify a public safety champion for Dallas County.
- Synchronize data collection systems and processes across local governmental entities and departments.
- Develop a coordinated and aligned public safety plan for Dallas County.
- Eliminate “silos” that cause communication and collaboration barriers for public safety.
- Facilitate public engagement and hold a conference of cities to discuss public safety issues and strategies.
- Benchmark Dallas County crime statistics with similarly-sized metropolitan areas.
- Assess capacity of the County jail and regional partners to provide alternative sentencing options.
- Align crime prevention and prosecution goals with County and other governmental entities.
- Leverage impact in the County by implementing best practices.
- Establish a formal community planning effort to address criminal justice issues.
- Identify a central point of contact for Dallas County homeland security issues.
- Join local, regional and state committees that address homeland security.
- Assess ability of first responders to communicate across the County.
- Evaluate allocation of adult and juvenile justice resources around Dallas County.
- Benchmark County jail operations with similarly-sized entities across the nation.
- Convene local criminal justice partners to identify and expand detention and sentencing alternatives.

Vision 4 Indicators

- Develop a “green plan” that assesses County-owned infrastructure and that identifies and addresses emissions sources.
- Participate in local, regional, state and national planning groups that develop and implement policies and program affecting air quality.
- Support flexible work initiatives to decrease day-time emission sources.
- Rank outside of the top 50 most polluted counties in Texas.
- Convene key Dallas County industries to identify challenges and meet air quality standards.
- Rank outside the top 10 Texas counties with air quality-related health risks.
- Work with regional affiliates and counties to leverage the County’s influence.
- Meet the NAAQS ozone attainment standard.
- Achieve a congestion index of 1.5.
- Support regional public transportation projects which ease congestion and increase efficiency.
- Continue to partner with County cities on local transportation projects.
- Participate in local, regional, state and national planning groups that develop and implement policies and programs that affect transportation.
- Leverage County’s resources and influence to ensure appropriate allocation of resources to the region.
- Synchronize road and bridge projects with city partners to ensure optimal operation and selection of projects.
- Support flexible work initiatives which will decrease congestion.

Vision 5 Indicators

- Coordinate and tailor County investment/reinvestment in underdeveloped areas.
- Collaborate with regional partners to provide tax incentives to facilitate economic development and enhancement in targeted areas.
- Assess/promote County resources to help recruit and retain businesses.
- Serve as a convener/architect to develop joint planning and implementation projects which cross jurisdictional boundaries.
- Collaborate with local cities to develop specific plans.
- Continue/increase funding for County trail program.
- Increase County’s emphasis on facilitating/initiating economic development and on improving the area’s quality of life.
- Continue/increase the County’s efforts to improve the attractiveness of its facilities.

EXAMPLE

DESCRIPTION OF DEPARTMENTAL FUNCTIONS TO DALLAS COUNTY STRATEGIC PLAN

| | |
|--|---|
| Department: | Planning & Development |
| Primary function of department: | Manages County's economic development, CDBG, HHW, and trail/open space programs. |
| Strategic plan vision(s) associated with department's primary function: | <i>Dallas County is the destination of choice for residents and businesses.</i> |
| Roles performed by department in support of strategic plan vision(s): | <p>Serves as TRADITIONAL SERVICE PROVIDER by operating County's CDBG, economic development, HHW, and trail/open space programs.</p> <p>Serves as an ARCHITECT by creating a county-wide trail system.</p> <p>Serves as a LEADER by providing smaller cities with CDBG funding (which allows them to undertake various community development activities that they otherwise would be able to undertake) and economic development technical assistance.</p> |
| Representative performance measures for department: | <p>Number of miles in County trail system.</p> <p>Increase in assessed valuation generated by economic development incentives.</p> |

EXAMPLE

DRAFT
3/11/2008

PROPOSED MISSION STATEMENT

Dallas County is committed to:

- (1) Aggressively meeting its responsibilities as a county government;
- (2) Efficiently and effectively addressing the public's health, safety, and well-being within the constitutional, statutory, and moral boundaries placed on Texas counties;
- (3) Delivering to its customers services that are the most convenient and of the highest quality ~~services possible with the least inconvenience to its customers;~~ and
- (4) ~~Ensuring that the~~ Providing a County's workforce that is exceptionally qualified, trained, and equipped to carry out the County's strategic plan.



Appendix C
Human Resource/Civil Service Examples and Form



DALLAS COUNTY
HUMAN RESOURCES/CIVIL SERVICE

Position Description Reclassification Request Form

General Instructions: Please complete this form and attach the current and proposed position descriptions, the current and proposed organization charts and any comparative position descriptions that can be identified.

A. Identification / General Information

| | |
|--------------------------|--|
| Current Position Title: | |
| Proposed Position Title: | |
| Current Position Grade: | |
| Department Name: | |
| Position Number: | |
| Supervisor Name: | |
| Supervisor Phone: | |
| Supervisor Email: | |

B. Brief Description of the Position

Use two or three brief and specific statements to summarize the general purpose of this position.

| |
|------------------------------------|
| The purpose of this position is to |
| |
| |
| This is accomplished by |
| |
| |
| Other duties include |
| |

C. Rationale for Reclassification

| |
|--|
| Explain what caused the changes in job duties. Be specific as to how those changes occurred and in what timeframe (i.e., last month, two years ago, etc.). Include such things as: changes in organizational structure, changes in department procedures; changes in grant or program scope; new programs/functions; introduction of new equipment/systems; reassignment of job duties/termination of other employees in the work unit, etc. |
| |
| Provide an explanation on the differences between the old and new job duties/responsibilities. Describe how the job has grown and changed since its creation. Include changes in the level of judgment, independence, problem solving and/or management (i.e., position was previously responsible for \$1,000,000 and is now |

| |
|---|
| responsible for \$10,000,000; position was previously responsible for supervising two employees and is now responsible for supervising fifteen employees, etc.). Please clearly outline the specific new job duties/responsibilities. |
| |
| Are the new duties/responsibilities additional or have they been allocated from another position(s)? Please specify. If the duties have been reassigned, please provide the name, job title, and an explanation of why the duties are being reassigned. Please explain the impact on the position losing the job duties/responsibilities. |
| |
| What duties/responsibilities have been removed from the position? What position (if any) is now responsible for them? |
| |
| Outline the changes in the level of authority of the position (i.e., position now has authority to sign off on expenditures for goods/services). Have any reporting relationships to or from this position been altered? |
| |
| What specific tasks or activities make the job duties/responsibilities more complex? |
| |
| Please outline any existing positions that you feel are a comparison to this position. Please provide specific reasons why. |
| |
| What are the performance expectations? What goal(s) in the strategic plan does the position classification recommendation support? |
| |

D. Essential Functions

Description of Essential Function: Describe in detail the primary or most important functions of this position. In addition to each function, list the tasks performed to accomplish each function. Use clear, concise sentences.

Percentage of Time: Estimate the percentage of total working time *per year* that is taken up with each duty. These estimates should be made after all essential functions have been listed. The percentages in this column must equal 100%. Duties that require less than 5% of your time should not be listed.

Essential/Non-Essential (E or NE): Write ONE letter that best describes the demands of the function during a typical 8-hour workday.

| | | |
|---|------|---------|
| EXAMPLE ↓ Function: Maintains exterior of facilities | Time | E or NE |
| <i>Tasks performed to accomplish this function:</i> By picking up and removing litter and debris from grounds, sweeping and edging Sidewalks, mowing lawns, trimming shrubs and raking leaves. | 30% | E |
| 1. Function: | Time | E or NE |
| <i>Tasks performed to accomplish this function:</i> | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| 2. Function: | Time | E or NE |
| <i>Tasks performed to accomplish this function:</i> | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| 3. Function: | Time | E or NE |
| <i>Tasks performed to accomplish this function:</i> | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| 4. Function: | Time | E or NE |
| <i>Tasks performed to accomplish this function:</i> | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| 5. Function: | Time | E or NE |
| <i>Tasks performed to accomplish this function:</i> | | |
| | | |

| | | |
|--|--|--|
| | | |
| | | |
| | | |
| | | |
| | | |

E. Visual-Mental Demands

1. Visual-Mental Demands: Select that which best describes the overall visual-mental demands of this position, then select the frequency of time in which you perform under this condition job. (For example: 0 to 1/3 means your job works under these conditions between never and up to 1/3 of the time.)

| | | | Frequency of Time | | |
|-----------------------|----|--|-----------------------|-----------------------|-----------------------|
| | | | 0-1/3 | 1/3-2/3 | 2/3-Over |
| <input type="radio"/> | 1. | Work requires a minimum of mental and visual concentration to detail most of the time. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 2. | Work requires a moderate amount of mental and visual concentration in the performance of various operations. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 3. | Work requires regular mental and visual concentration most of the time. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

F. Physical Demands, Equipment Requirements, Working Conditions

1. Strength Demands: Select that which best describes the overall physical demands of this position, then select the frequency of time in which you perform under this condition. (For example: 0-1/3 means your job has these demands between never and up to 1/3 of the time.)

| Strength Demands | | | Frequency of Time | | |
|-----------------------|----|--|-----------------------|-----------------------|-----------------------|
| | | | 0-1/3 | 1/3-2/3 | 2/3-Over |
| <input type="radio"/> | 1. | Work requires normal sitting and standing and generally the occasional lifting of 25 pounds or less. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 2. | Work requires moderate exertion and the occasional lifting of 26-50 pounds. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 3. | Work requires heavy exertion and the regular lifting of 51-75 pounds. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 4. | Work requires regular strenuous effort and regular lifting of over 76 pounds. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

2. Machines, Tools, Equipment and Work Aids: List machines, tools and equipment required for this position. (Do not include computer equipment and software – use the next section for this.)

| |
|--|
| |
| |

3. Computer Equipment and Software: List specialized computer equipment and software required for this position. (personal computers and standard software such as Word and Excel are assumed. Indicate if no computers or software are used to perform this function)

| |
|--|
| |
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| |
|--|
| |
|--|

4. Environmental, Health and Safety Conditions: Select any and all noted conditions, and then select the frequency of time in which you are required to work under these conditions.

| <i>Environmental Condition</i> | | | Frequency of Time | | | |
|--------------------------------|----|--|-----------------------|-----------------------|-----------------------|-----------------------|
| | | | 0-1/3 | 1/3-2/3 | 2/3-Over | Seasonally |
| <input type="radio"/> | 1. | Extreme temperature changes (heat, cold, extreme weather changes) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 2. | Respiratory hazards (fumes, gases, chemicals, dust and dirt) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 3. | Noise and vibration (sufficient to cause hearing loss) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 4. | Physical hazards (high voltage, dangerous machinery) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

| <i>Health and Safety Conditions</i> | | | 0-1/3 | 1/3-2/3 | 2/3-Over | Seasonally |
|-------------------------------------|----|-------------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| <input type="radio"/> | 1. | Driving | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 2. | Mechanical hazards | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 3. | Chemical hazards | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 4. | Electrical hazards | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 5. | Fire hazards | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 6. | Communicable diseases | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 7. | Physical danger or abuse (specify): | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 8. | Other (specify): | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

5. Primary Work Location: Check the type of location where most of the position's duties are performed.

| | | | | | | | | |
|-----------------------|----|--------------------|-----------------------|----|------------------|-----------------------|----|-----------------------------------|
| <input type="radio"/> | 1. | Office Environment | <input type="radio"/> | 4. | Clinic | <input type="radio"/> | 6. | Residential Facility (not secure) |
| <input type="radio"/> | 2. | Shop or Warehouse | <input type="radio"/> | 5. | Secured Facility | <input type="radio"/> | 7. | Vehicle |
| <input type="radio"/> | 3. | Other (Specify) | | | | | | |

6. Protective Equipment Required: List any protective equipment required for this position.

| |
|--|
| |
| |

G. Position Minimum Requirements

1. Formal Education: Record the minimum education required for this position (do not necessarily use the incumbent's education level, but the MINIMUM required for this position).

| | | |
|-----------------------|----|-----------------------------------|
| <input type="radio"/> | 1. | Less than high school education |
| <input type="radio"/> | 2. | High school diploma or equivalent |
| <input type="radio"/> | 3. | One year college |
| <input type="radio"/> | 4. | Two-year Associate's degree in: |

| | | |
|-----------------------|----|--|
| <input type="radio"/> | 5. | Four-year Bachelor's degree in: |
| <input type="radio"/> | 6. | Graduate or professional work or advanced degree in: |

2. Experience: Record the minimum experience required for this position (not necessarily the incumbent's experience).

| | | |
|-----------------------|-----|--|
| <input type="radio"/> | 1. | No previous experience required |
| <input type="radio"/> | 2. | Six months to one year experience in/as: |
| <input type="radio"/> | 3. | Minimum of one year experience in/as: |
| <input type="radio"/> | 4. | Minimum of two years experience in/as: |
| <input type="radio"/> | 5. | Minimum of three years experience in/as: |
| <input type="radio"/> | 6. | Minimum of four years experience in/as: |
| <input type="radio"/> | 7. | Minimum of five years experience in/as: |
| <input type="radio"/> | 8. | Minimum of six years experience in/as: |
| <input type="radio"/> | 9. | Minimum of seven years experience in/as: |
| <input type="radio"/> | 10. | Minimum of eight years experience in/as: |

3. Certification and Other Requirements: List licenses, certifications, statutory requirements, or registrations required for the position (not necessarily the incumbent's current licenses or certifications). Use the exact name of the license, certification or requirement.

| |
|--|
| 1. |
| 2. |
| 3. |
| 4. |
| 5. Valid Drivers License Required? <input type="radio"/> Yes <input type="radio"/> No If Yes, what type? |

H. Planning and Management Responsibilities

1. Problem Solving and Analytical Skills: What is the minimum level of problem solving ability and/or analytical skill required for this position? Select one factor that most closely matches this position.

| | | |
|-----------------------|----|---|
| <input type="radio"/> | 1. | Work tasks are usually identical, with simple rules and detailed instructions. |
| <input type="radio"/> | 2. | Work tasks are routine, but not identical. |
| <input type="radio"/> | 3. | Work tasks are usually different, with somewhat diversified procedures and precedents. |
| <input type="radio"/> | 4. | Work tasks are varied and diversified, requiring analytical, interpretive, evaluative and/or constructive thinking. |
| <input type="radio"/> | 5. | Work tasks are of a non-recurring nature, where procedures are not clearly defined. Tasks require in-depth analytical, evaluative, developmental and constructive thinking. |
| <input type="radio"/> | 6. | Work tasks are of the broadest sense, requiring strategic planning, analytical, and evaluative, developmental and constructive thinking. |

2. Planning: Does this position involve planning work activities or projects? Yes No
 If yes, describe the planning or project management activities associated with this position.

| |
|--|
| |
| |
| |
| |
| |
| |

3. Budgetary Responsibility: Does this position involve working with the annual budget? Yes No
 If yes, please indicate the types of budgetary activities required.

| | | |
|-----------------------|----|---|
| <input type="radio"/> | 1. | Researches and prepares information for use in budget documents for a department. May recommend budget allocations. |
| <input type="radio"/> | 2. | Researches and compiles data for budget monitoring, enters or oversees data entry. May monitor budget expenditures (typically non-discretionary expenditures) for a work unit of less than department size or for a small department. |
| <input type="radio"/> | 3. | Oversees budget preparation of department budget. Reviews and approves expenditures of significant budgeted funds for the department or researches and prepares recommendations for countywide budget expenditures. |
| <input type="radio"/> | 4. | Approves the final departmental budget and presents the budget document or information. Monitors the progress of fiscal objectives and adjusts plans as necessary for completion. |

4. Scope of Budgetary Responsibility: Provide the total amount, in dollars, of the operating budget and any contracts or grants. This amount should include project management or organizational budget responsibility.

| | |
|-----------------------------|-----------------------|
| Total county amount \$ | Total grant amount \$ |
| | |
| <u>Additional comments:</u> | |
| | |

5. Management and Supervisory Responsibility: Does this position involve directing the work of others?

Yes No

If yes, please list the classification titles (not working titles) and number of employees supervised.

| <u>Classification Title(s)</u> | <u>Number of Employees</u> |
|--------------------------------|----------------------------|
| | |
| | |
| | |

6. Management and Supervisory Responsibility: If you answered “Yes” to the management and supervisory question previously, indicate the management and supervisory direction provided by the position. (Choose one)

| | | |
|-----------------------|----|--|
| <input type="radio"/> | 1. | Responsibility requires the occasional direction of helpers, assistants, seasonal employees, interns, volunteers or temporary employees. |
| <input type="radio"/> | 2. | Responsibility requires functioning as a lead worker performing essentially the same work as those directed, and includes overseeing work quality, training, instructing, and scheduling work. |
| <input type="radio"/> | 3. | Responsibility requires supervising and monitoring the performance for a regular group of employees or a work unit including providing input on hiring and performance actions, work objectives, program effectiveness and realignment of work as needed. |
| <input type="radio"/> | 4. | Responsibility requires managing and monitoring work performance by directing subordinate supervisors or administrators including authorizing final decisions on hiring and disciplinary actions, evaluating program and work objectives and effectiveness, and realigning work and staffing assignments as necessary. |
| <input type="radio"/> | 5. | Responsibility requires managing and monitoring work performance of senior department managers including evaluating program and work objectives and effectiveness, establishing broad organizational goals and realigning work and staffing for the department. |

7. **Freedom to Act:** This factor will assist in determining the position's level of freedom to act. Limitations of freedom to act or position independence may include supervisory control, the nature of the work, established policies and procedures, and/or legal constraints. Indicate the extent to which you are free to act in the absence of supervision or management or the direction provided by policies and procedures. (Choose one)

| | | |
|-----------------------|----|--|
| <input type="radio"/> | 1. | Follows direct, simple and detailed instructions, with procedures clearly defined, immediate supervision always available and work regularly reviewed. |
| <input type="radio"/> | 2. | Follows routine procedures and guidelines in the application of prescribed duties. Works under close supervision with frequent review of work. |
| <input type="radio"/> | 3. | Follows standard procedures and established guidelines with some latitude in deciding how to achieve end result. Non-standard work is referred to the supervisor for guidance and work is reviewed periodically by supervisor on an "as needed" basis. |
| <input type="radio"/> | 4. | Follows diversified procedures and implements processes to accomplish end results, within guidelines. Immediate supervision is available upon request. |
| <input type="radio"/> | 5. | Plans details of methods to attain desired objectives working within established policy. Requires use of initiative and resourcefulness in developing processes and procedures. Supervision is available for special problems and work is reviewed on problem situations. |
| <input type="radio"/> | 6. | Works independently on broad assignments with specific given objectives. Responsible for planning and performance with little or no guidance or assistance from supervisor during developmental process. Work is reviewed upon completion of objectives. |
| <input type="radio"/> | 7. | Works independently on major assignments with responsibility for all planning of work of assigned objectives. Makes major decisions limited only by broad policy rulings and proceeds along lines of own initiative. Supervision is available for a wide range of problems involving general policy and work is reviewed at the end of major projects. |
| <input type="radio"/> | 8. | Work is related to the broader administrative, executive and policy-making activities and major programs/plans. Work is checked through consultation and agreement with others rather directives by superiors. Supervision is available for unique, broad and diverse problems with overall effect on departmental goals and objectives. |
| <input type="radio"/> | 9. | Work is generally unguided. |

I. Human Relations

Interpersonal/Human Relations Skills: This factor measures the amount and level of personal interaction with those outside direct reporting relationships (internal and external customers). The interaction may include those in the general public, volunteers, other county divisions and representatives of boards and commissions, governmental organizations, and officials, vendors and suppliers. Select one factor that most closely matches this position, and specify the frequency of time used in performing this job.

| | | | Frequency of Time | | |
|-----------------------|----|---|-----------------------|-----------------------|-----------------------|
| | | | 0-1/3 | 1/3-2/3 | 2/3-Over |
| <input type="radio"/> | 1. | Work requires answering simple inquiries or referring inquiries to others. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 2. | Work requires handling inquiries and reasonable complaints involving an explanation of standard policies, procedures and non-controversial matters. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 3. | Work requires handling critical inquiries and complaints not of a standard nature; requires tact and diplomacy in presentation to obtain cooperation or approval. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <input type="radio"/> | 4. | Work requires contacts wherein poor handling may result in poor coordination of all efforts; deals with controversial or exception policies or procedures that could result in litigation or damages if improperly handled. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

J. Career Path Definition

Please indicate other county positions that may be related to this position, as part of a career family.

| | |
|---|----|
| Other classifications in the county to which those that hold my current classification might be promoted. | 1. |
| | 2. |
| My Current Classification | |
| Other classifications in the county that would prepare applicants for my current classification. | 1. |
| | 2. |

K. Signature/Approval

To the best of my ability, I have completed this questionnaire, and believe it to be an accurate description of my position or the proposed position.

| | |
|--|------|
| Employee Signature | Date |
| Immediate Supervisor Signature | Date |
| Comments: | |
| Department Head/Elected Official Signature | Date |
| Comments: | |



Appendix D
Budget Analyst Assignments

Ryan Brown, Budget Officer x 6384
ANALYST ASSIGNMENTS

| Analyst | Departments | Funds | Special Assignments |
|--|--|--|---|
| Ronica Watkins, Assistant Budget Officer x 6363 | Justices of the Peace DRO Truancy Court Tax Office County Judge District Court Admin Health & Human Services Human Resources Jury Services County Treasurer Budget and Evaluation Purchasing Commissioners Court | General Fund Grant Fund Section 8 Fund A. D. R. Fund | Truancy Dispute Mediation Svs Miscellaneous Equipment Grant Coordination Indirect / Cost Plan |
| Shahrzad Rizvi x 7363 | Building Security Comm Supervision Planning & Development Data Services Road & Bridge Districts Operations Services Public Works Public Service Program Texas Cooperative County Auditor | Comm Supv Fund Major Technology Fund Road & Bridge Fund Major Capital Fund Perm. Improvement Fund Debt Service Fund | Revenue Projections Cap Improvement Plan Official Notices Mgt Report Vol I Web Updates Transfers Vehicles |
| Alejandro Moreno x 6387 | County Clerk District Clerk District Courts County Courts Court of Appeals Criminal Magistrates Criminal Justice Dept. 1 st Judicial Region Juvenile Department Juvenile Courts Hospital District NorthSTAR Public Defender Employee Health Center | Appellate Court Fund Historical Exhibit Fund Historical Comm Fund Juv Probation Fund | Mgt Report Vol. II Sixth Floor Museum Child Protective Services Dallas CASA DDA |
| Erica Terrazas x 6389 | Sheriff Constables District Attorney Emergency Management Fire Marshal Elections Veterans Services Institute of Forensic Sc. | Law Library Fund SCAAP Charter School Grant Fund | City/County Jail SCAAP Claim Mgt Report Vol. III Social Security Info |

