



Finance Committee Meeting Agenda Packet

December 6, 2018, 1:00 pm

Cascades West Center
1400 Queen Avenue, SE
2nd Floor, Large Conference Room
Albany, OR 97322

Meeting locations are wheelchair accessible. If you need special assistance, please contact Oregon Cascades West Council of Governments at 541-967-8720, forty-eight (48) hours prior to the meeting.

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**OREGON CASCADES WEST COUNCIL OF GOVERNMENTS
FINANCE COMMITTEE AGENDA
December 6, 2018
1:00 pm**

Cascades West Center
1400 Queen Avenue SE
Albany, OR 97322

An Executive Session may be called as deemed necessary by the Chair, pursuant to ORS 192.660.

1. Minutes of Previous Meetings (Treasurer Claire Hall)
(1:00 – 1:05 pm)

Review of the September 20, 2018 Finance Committee minutes (Page 5).

ACTION: Motion to approve the minutes of the September 20, 2018 Finance Committee meeting.

2. Financial Report (Finance Director Sue Forty)
(1:05 – 1:15 pm)

Finance Director Sue Forty will review the Financial Report and respond to questions (Page 7, Page 9).

ACTION: Information only.

3. Approval of Proposal Salary Range for New Assistant Veterans Services Officer
(Deputy Executive Director Rachael Maddock-Hughes)
(1:15 – 1:20 pm)

The Deputy Director will present a proposed salary range for a new Assistant Veterans Services Officers position to support the Benton County Veterans Services Officers office (Page 13).

ACTION: Motion to recommend to the Board of Directors' approval of the salary range, as presented, for the New Assistant Veterans Services Officer.

4. Approval of the 2019 Finance Committee Meeting Schedule (*Treasurer Claire Hall*)
(1:20 – 1:25 pm)

The Committee will review, discuss, and approve a meeting schedule for the 2019 calendar year (Page 23).

ACTION: Motion to approve 2019 Finance Committee Meeting schedule.

5. Other Business
(1:25 – 1:30 pm)

6. Adjournment
(1:30 pm)

**OREGON CASCADES WEST COUNCIL OF GOVERNMENTS
FINANCE COMMITTEE MINUTES
September 20, 2018**

MEMBERS: Mayor Sharon Konopa, Albany; Commissioner Anne Schuster, Benton County; Mayor Biff Traber, Corvallis; and Councilor Bob Elliott, Lebanon.

STAFF: Executive Director Fred Abousleman; Deputy Director Rachael Maddock-Hughes; Finance Director Sue Forty; Community and Economic Development (CED) Director Phil Warnock; Senior and Disability Services (SDS) Director Randi Moore; Community Services Program (CSP) Director Jennifer Moore; and Administrative Assistant Terri Sharpe.

The Oregon Cascades West Council of Governments' (OCWCOG) Finance Committee Meeting was called to order by Mayor Sharon Konopa on September 20, 2018 at 1:05 pm at the Cascades West Center in Albany.

1. Minutes of Previous Meetings

Commissioner Anne Schuster motioned to approve the minutes of the May 17, 2018 Finance Committee meeting, Mayor Biff Traber seconded. Motion was passed unanimously.

2. Financial Report

Finance Director Sue Forty reviewed the June 30th Close Financial Report.

Commissioner Schuster questioned line item *Maintenance and Repairs*. Finance Director Forty clarified that OCWCOG budgeted to have the roof done, which did not happen.

Commissioner Schuster questioned line item *Employee Settlement*. Finance Director Forty explained it is a transfer of litigation funds from one agency to another. OCWCOG was provided \$15,000 from the insurance company for litigation which shows as revenue under *Employee Settlement* and as an expense under *Legal Services*.

Commissioner Schuster questioned line item *Grants*. Finance Director Forty explained that Staff budget in what they believe they will receive in grants, but some of the grants may not be realized.

Mayor Konopa commented on the increase in revenue in *Loan Packaging Fees*. Finance Director Forty explained that this was due to CED-Lending Loan Officer Sandra Easdale taking over the servicing of Urban Renewal packages from Stanton and she will also be servicing loans from Sweet Home.

The Finance Committee accepted the OCWCOG Financial Report.

3. Financial Management Policies and Procedures Manual

Finance Director Forty presented OCWCOG's new *Financial Management and Procedures Manual* for adoption. The Finance Department had been working with a written manual in the past, but would like this updated *Manual* to be adopted.

Commissioner Schuster asked if there was any sustainability policy for OCWCOG, as in looking at packaging and cost savings. Executive Director Fred Abousleman said this *Manual* does not include such a policy, but would be happy to look at options for adopting a

sustainability policy. Executive Director Abousleman noted that OCWCOG has a sustainability fund for the building, but he is unsure if the organization has a policy to drive the fund. Finance Director Forty said she believes when the Finance Committee adopted the Sustainability Reserve, there was a small section written. Executive Director Abousleman will look into it. Finance Director Forty said OCWCOG does recycle, but as far as larger scale energy saving, that will be done further down the line with the organization's staff. Commissioner Schuster also recommended looking into green cleaning products.

Mayor Konopa thought the *Manual* was very thorough.

Commissioner Schuster asked if there was anything in place that looks at what OCWCOG does for the health of the community; is OCWCOG equitable and diverse? Executive Director Abousleman said that OCWCOG is bound by law to be equitable and diverse especially with Senior and Disability Services, which has mandates on equability.

Commissioner Schuster asked about internally within OCWCOG. Executive Director Abousleman said the Wellness Committee is adopting Samaritan's *7 Point Wellness Philosophy*, which covers everything from spiritual wellness to financial wellness. CED Director Phil Warnock said as Directors they are requested to engage one-on-one with their staff to see if they know what their job is and what is expected of them. He found that in his department they knew what their job was, but not what it could be. This has helped to foster an environment in which they are an active participant in providing feedback to the organization. Executive Director Abousleman meets once a year with all new employees for their feedback as well.

Executive Director Abousleman said he receives feedback at the Director and Supervisor level and he sees a lot of cross pollination within the teams. There are teams that do well and others that struggle. One area they do not do well with is getting the three departments together, due to the structure of the building. He said if there is something OCWCOG can adopt he would be happy to review. Commissioner Schuster suggested talking with Steve Smith from Tech Labs out of Albany who has won employer of the year for almost 20 years. Executive Director Abousleman said they are always looking at different ways to grow.

Councilor Bob Elliott motioned to review and recommend to the OCWCOG Board of Directors for resolution to adopt OCWCOG's *Financial Management Policies and Procedures Manual*, Mayor Traber seconded. Motion passed unanimously.

4. Other Business

There was no other business.

5. Adjournment

Adjourned at 1:28

Minutes recorded by Terri Sharpe.



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 (541) 967-8720 • FAX (541) 967-6123

MEMORANDUM

DATE: December 6, 2018
TO: OCWCOG Finance Committee
FROM: Sue Forty, Finance Director
RE: OCWCOG Financial Update

Please accept the following snapshot, and Consolidated Revenue and Expense Statement, for period ending October 31, 2018 with notes to pertinent items. We strive to make the following financial information consistent, accessible, and transparent.

Snapshot by Major Line Item

| | FY2019 Budget | October YTD | Percentage YTD | Prior Year YTD |
|---------------------------------------|----------------------|-----------------------|-----------------------|-----------------------|
| Dues | 296,303.00 | 237,643.54 | 80.20% | 99.29% |
| Contracts | 2,029,684.00 | 558,201.78 | 27.50% | 17.78% |
| Grants | 265,169.00 | 54,862.00 | 20.89% | 29.17% |
| Donations | 282,000.00 | 23,112.52 | 8.20% | 34.59% |
| State Revenue | 1,865,511.00 | 224,606.77 | 12.04% | 19.05% |
| Federal Revenue | 13,128,129.00 | 2,676,217.51 | 20.39% | 25.85% |
| Coordinated Care | 7,379,243.00 | 2,002,504.08 | 27.14% | 24.16% |
| Total Income (all line items) | 39,512,994.00 | 7,026,240.55 | 17.78% | 19.50% |
| | | | | |
| Total Payroll Expense | 14,372,101.00 | 4,302,752.87 | 29.94% | 27.07% |
| | | | | |
| Contract Expense | 8,957,393.00 | 3,257,005.67 | 36.36% | 31.72% |
| Indirect Expense | 2,148,610.00 | 716,203.32 | 33.33% | 33.33% |
| Maintenance & Repair | 128,650.00 | 28,972.72 | 22.52% | 24.47% |
| Supplies | 104,518.00 | 36,186.83 | 34.62% | 34.53% |
| Telephone | 152,108.00 | 54,651.51 | 35.93% | 23.02% |
| Travel / Training | 301,686.00 | 97,793.53 | 32.42% | 30.05% |
| Total Expense (all line items) | 39,512,994.00 | 9,266,531.36 | 23.45% | 22.79% |
| Net Gain / (Loss) | | (2,240,290.81) | | |

Fiscal Year (FY) FY2018 - 2019 Financial Narrative (Revenue)

- a. Net/Gain (Loss) FY2018-2019 Budget, OCWCOG has a balanced budget. Net Gain/Loss reflects a loss because Beginning Balance numbers are not currently recorded. We will record these numbers in the financial system once the annual audit is complete.
- b. All member regular dues have not been received.
- c. Contract revenue is low. Vacant positions and mid-year project start dates have directly reflected reimbursement-based contracts.
- d. Grant revenue is low. It is grant writing season and staff are working on several requests.
- e. Donations revenue is low. The year-end direct solicitation mailing for *Meals on Wheels* is in final stages of preparation.
- f. State revenue contract percentages are low due to the programs being reimbursement based and are billed in the month after the expense is incurred. *OPI* contact revenue is down due to a .875 FTE Case Management vacancy. We have not grown the case load due to these vacancies. These positions are being actively recruited.
- g. Federal revenue contract percentages are low due to the programs being reimbursement based and are billed in the month after the expense is incurred. *OAA* contact revenue is down due to a .875 FTE Case Management vacancy. We have not grown the case load due to these vacancies. These positions are being actively recruited.

FY2018-2019 Financial Narrative (Personnel and Material & Supplies)

- a. Personnel Expense is down slightly. All critical vacant positions are filled as soon as possible. The organization is reviewing all positions when vacant to ensure funding is utilized in the most equitable way. As of October 31, 2018, there were 11 vacant positions that are being actively recruited.
- b. Contract expense is on budget.
- c. Indirect expenses are on budget. Indirect rates are charged to all program areas based on the number of staff employed in each program, and are used to fund General Administration, Human Resources, Finance, and Technology Services.
- d. Maintenance and Repair expenses are low. Budgeted projects being scheduled.
- e. The organization continues to monitor the implementation of the centralized purchasing program. Supply costs are on budget.
- f. Telephone and Travel are all on budget. Training is a little low and will pick up as vacancies are filled and staff seek additional training opportunities.

If you need additional information or clarification, please contact Finance Director Forty or Finance Manager Janet Cline.

Consolidate Revenue and Expense Statement

Finance Committee Financial Report

For Period Ended October 31, 2018

Revenues year-to-date under budget

Revenues year-to-date over budget

Percent of budget to date 33.33%

| Acct No | Description | Budget | YTD Bal | YTD % | |
|---------|---------------------------------|-------------------------|------------------------|---------------|--|
| 000710 | Beg Bal-Restricted for Grants | \$ 1,746.00 | \$ - | 0.00% | Beginning Balances will be populated after annual audit is complete. |
| 000725 | Beg Bal-Restrict for Contracts | \$ 1,943,336.00 | \$ - | 0.00% | |
| 000735 | Beg Bal-Restricted Reconcile | \$ 1,532,985.00 | \$ - | 0.00% | |
| 000740 | Beg Bal-Restricted for Other | \$ 2,317,449.00 | \$ - | 0.00% | |
| 000745 | Beg Bal-Restrict Reserve | \$ 2,230,000.00 | \$ - | 0.00% | |
| 000750 | Beg Bal-Unrestricted | \$ 2,583,432.00 | \$ - | 0.00% | |
| 000826 | Borrowers Fees | \$ 1,500.00 | \$ 209.64 | 13.98% | Limited loan activity |
| 000805 | Contract Revenue | \$ 2,029,684.00 | \$ 558,201.78 | 27.50% | |
| 000846 | Coordinated Care | \$ 7,379,243.00 | \$ 2,002,504.08 | 27.14% | |
| 000807 | Donations | \$ 282,000.00 | \$ 23,112.52 | 8.20% | Meals on Wheels year-end solicitation is being prepared. |
| 000801 | Dues | \$ 296,303.00 | \$ 237,643.54 | 80.20% | Some dues are outstanding. |
| 000860 | Economic Development Admin | \$ 75,000.00 | \$ 18,750.00 | 25.00% | |
| 000868 | Environmental Protection Agency | \$ 200,000.00 | \$ - | 0.00% | |
| 000870 | Federal Contracts | \$ 55,000.00 | \$ - | 0.00% | |
| 000867 | Federal Match | \$ 497,381.00 | \$ 28,555.28 | 5.74% | Program Match - Veterans match billed quarterly, Title XIX billed at year end. |
| 000864 | Federal Senior Meals | \$ 388,072.00 | \$ 103,976.46 | 26.79% | |
| 000802 | Fees For Service | \$ 84,000.00 | \$ 29,276.70 | 34.85% | |
| 000806 | Grant Revenue | \$ 265,169.00 | \$ 54,862.00 | 20.69% | It is grant writing season, staff are working on several request. |
| 000808 | Interest Revenue | \$ 232,211.00 | \$ 108,699.07 | 46.81% | |
| 000803 | Internal Transfer | \$ 2,153,610.00 | \$ 717,130.23 | 33.30% | |
| 000822 | Loan Packaging Fees | \$ 15,000.00 | \$ 2,400.00 | 16.00% | Limited loans so far this year |
| 000824 | Match | \$ 90,953.00 | \$ 25,820.15 | 28.39% | RSVP matching funds |
| 000804 | Miscellaneous Revenue | \$ 3,500.00 | \$ (347.54) | -9.93% | Refund from prior year |
| 000843 | ODOT | \$ 639,367.00 | \$ 96,728.57 | 15.13% | AAMPO & CAMPO had some staffing vacancies, revenue is reimbursement based. |
| 000862 | Older Americans Act | \$ 1,150,854.00 | \$ 253,000.00 | 21.98% | |
| 000841 | Oregon Project Independence | \$ 1,120,978.00 | \$ 127,878.20 | 11.41% | OPI is a reimbursement based program, revenue is low due to staff vacancy that is being recruited. |
| 000829 | Program Administration | \$ 132,055.00 | \$ 38,311.98 | 29.01% | |
| 000823 | Program Income | \$ 657,153.00 | \$ 216,402.00 | 32.93% | |
| 000820 | Program Meals Revenue | \$ 153,804.00 | \$ 57,372.50 | 37.30% | |
| 000828 | Service Fees | \$ 5,550.00 | \$ 2,440.04 | 43.96% | |
| 000869 | Siletz Revenue | \$ 5,000.00 | \$ 4,335.00 | 86.70% | Additional Tribal meals being served, budget adjustment may be needed. |
| 000819 | Special Event Revenue | \$ - | \$ 16,544.94 | 0.00% | This account was created for special event expense. |
| 000812 | Sponsorship | \$ 25,000.00 | \$ 13,166.00 | 52.66% | |
| 000863 | Title XIX | \$ 10,645,542.00 | \$ 2,239,666.77 | 21.04% | |
| 000809 | Transfers In | \$ 103,671.00 | \$ 21,666.64 | 20.90% | The majority of transfers are done at year end. |
| 000865 | USDA | \$ 111,280.00 | \$ 27,934.00 | 25.10% | |
| 000840 | Veterans | \$ 105,166.00 | \$ - | 0.00% | This is a quarterly payment, 1st quarter funds received in October. |
| | REVENUE | \$ 39,512,994.00 | \$ 7,026,240.55 | 17.78% | |
| 000410 | Leave Benefits | \$ 491,240.00 | \$ 166,597.06 | 33.91% | |

| | | | | | | | |
|--------|------------------------------------|----|--------------|----|------------|--------|---|
| 000420 | Fringe Benefits | \$ | 802,915.00 | \$ | 443,009.10 | 55.18% | One-time benefit payment for Insurance differential. |
| 000421 | Insurance Benefits | \$ | 2,724,508.00 | \$ | 688,876.40 | 25.28% | |
| 000425 | PERS Benefits | \$ | 1,742,500.00 | \$ | 333,132.08 | 19.12% | |
| 000430 | PERS Reserve | \$ | 91,852.00 | \$ | 25,044.21 | 27.27% | |
| 0001ED | Executive Director | \$ | 135,316.00 | \$ | 48,086.61 | 35.54% | |
| 0004DD | Deputy Director | \$ | 91,123.00 | \$ | 36,799.19 | 40.38% | |
| 0004PD | Program Director | \$ | 294,835.00 | \$ | 101,015.81 | 34.26% | |
| 0004SD | Services Director | \$ | 71,753.00 | \$ | 26,618.61 | 37.10% | |
| 0010PM | Program Manager | \$ | 66,278.00 | \$ | 34,103.46 | 51.46% | Retired staff returned, working limited hours until program vacancies are filled. |
| 0013PS | RSVP Supervisor | \$ | 610,808.00 | \$ | 199,514.74 | 32.66% | |
| 0016LO | Loan Officer | \$ | 71,603.00 | \$ | 19,429.31 | 27.13% | |
| 0019CA | Clerical Assistant | \$ | 13,594.00 | \$ | - | 0.00% | Vacant position - being recruited. |
| 0019PM | Personnel Manager | \$ | 90,194.00 | \$ | 27,931.03 | 30.97% | |
| 0019TM | Technology Services Manager | \$ | 82,845.00 | \$ | 28,259.53 | 34.11% | |
| 0046CM | Case Manager | \$ | 1,915,810.00 | \$ | 575,680.01 | 30.05% | |
| 0053CC | Contracts Coordinator | \$ | 83,266.00 | \$ | 19,929.14 | 23.93% | |
| 0055CS | Clerical Supervisor | \$ | 51,347.00 | \$ | 19,110.69 | 37.22% | |
| 0060AS | Accounting Specialist | \$ | 52,303.00 | \$ | 15,887.27 | 30.38% | |
| 0064ES | Eligibility Specialist | \$ | 1,024,702.00 | \$ | 317,681.71 | 31.00% | |
| 0064MM | Money Management Coordinator | \$ | - | \$ | 6,029.28 | 0.00% | |
| 0067EA | Executive Assistant | \$ | 50,028.00 | \$ | 17,735.47 | 35.45% | |
| 0070AC | Accounting Clerk II | \$ | 38,510.00 | \$ | 13,963.28 | 36.26% | |
| 0076AA | Administrative Assistant | \$ | 406,804.00 | \$ | 98,246.54 | 24.15% | |
| 0085CS | Clerical Specialist | \$ | 285,716.00 | \$ | 82,343.10 | 28.82% | |
| 0085WS | Workstation Support Specialist | \$ | 51,141.00 | \$ | 17,372.53 | 33.97% | |
| 013CDP | CED Planner II | \$ | 193,302.00 | \$ | 24,545.78 | 12.70% | |
| 013MDR | MPO Director | \$ | - | \$ | 2,427.42 | 0.00% | |
| 013TSM | Transportation Manager | \$ | 79,207.00 | \$ | - | 0.00% | Vacant position - being recruited. |
| 025NSS | Network Support Specialist | \$ | 77,178.00 | \$ | 25,021.49 | 32.42% | |
| 031CDP | CED Planner | \$ | 185,896.00 | \$ | 54,111.09 | 29.11% | |
| 034APS | Adult Protective Services Spec | \$ | 402,982.00 | \$ | 134,425.74 | 33.36% | |
| 037DTC | Diversion & Transition Coordinator | \$ | 189,222.00 | \$ | 60,386.55 | 31.91% | |
| 037LCM | Lead Case Manager | \$ | 271,626.00 | \$ | 75,915.23 | 27.95% | |
| 045ISS | Information Support Specialist | \$ | 64,774.00 | \$ | 21,625.18 | 33.39% | |
| 052ALO | Assistant Loan Officer | \$ | 28,015.00 | \$ | - | 0.00% | Vacant position. |
| 055SMS | Senior Meals Supervisor | \$ | 58,228.00 | \$ | 16,944.43 | 29.10% | |
| 055VSO | Veterans Service Officer | \$ | 49,510.00 | \$ | - | 0.00% | Vacant position - being recruited. |
| 060FMC | Facility Maintenance Coordinator | \$ | 42,713.00 | \$ | 16,616.85 | 38.90% | |
| 061LES | Lead Eligibility Specialist | \$ | 31,987.00 | \$ | 14,583.13 | 45.59% | STEPS coordinator hired at higher level than budgeted. |
| 064ADR | ADRC Specialist | \$ | 226,610.00 | \$ | 72,968.30 | 32.20% | |
| 064ALW | License & Monitoring Spec | \$ | 73,480.00 | \$ | 27,926.70 | 38.01% | |
| 067CEA | Confidential Executive Assist | \$ | 91,940.00 | \$ | 47,722.05 | 51.91% | |
| 075LTB | Lead Trans Brokerage Spec. | \$ | 44,589.00 | \$ | 13,782.76 | 30.91% | |
| 075TBS | Transportation Brokerage Spec. | \$ | 415,042.00 | \$ | 126,656.84 | 30.52% | |
| 076IHA | In Home Assistant | \$ | 153,297.00 | \$ | 63,227.58 | 41.25% | |

| | | | | | | | |
|--|----------------------------------|-----------|----------------------|-----------|---------------------|---------------|--|
| 082SMC | Senior Meals Coordinator | \$ | 44,389.00 | \$ | 29,365.84 | 66.16% | Employee working out-of-class to cover critical work. |
| 090RSM | Relief Site Manager | \$ | 18,917.00 | \$ | 6,444.66 | 34.07% | |
| 099EXH | Extra Hire | \$ | 93,426.00 | \$ | 39,203.85 | 41.96% | |
| 88MSM3 | Meal Site Manager 3 | \$ | 194,780.00 | \$ | 66,455.24 | 34.12% | |
| | PERSONNEL | \$ | 14,372,101.00 | \$ | 4,302,752.87 | 29.94% | |
| Expenses year-to-date over budget | | | | | | | |
| 000504 | Advertising | \$ | 14,850.00 | \$ | 1,871.60 | 12.60% | |
| 000506 | Auto Expense | \$ | 12,500.00 | \$ | 3,237.02 | 25.90% | |
| 000510 | Bank Charges | \$ | 17,700.00 | \$ | 4,594.75 | 25.96% | |
| 000513 | Board/Comm/Meeting Expense | \$ | 39,050.00 | \$ | 5,862.79 | 15.01% | |
| 000516 | Computer Maintenance | \$ | 132,970.00 | \$ | 87,571.66 | 65.86% | Financial software one-time payment paid at beginning of FY 2018-2019 and contracted equipment for member cities billed out by Tech. |
| 000521 | Contract Administration | \$ | 2,500.00 | \$ | 572.00 | 22.88% | |
| 000522 | Contract Expense | \$ | 8,957,393.00 | \$ | 3,257,005.67 | 36.36% | |
| 000523 | Admin Contract Expense | \$ | 500,000.00 | \$ | 103,686.24 | 20.74% | |
| 000525 | Copying | \$ | 76,170.00 | \$ | 21,319.10 | 27.99% | |
| 000531 | Dues and Memberships | \$ | 46,925.00 | \$ | 26,986.72 | 57.51% | Some annual dues are and memberships paid at the beginning of the fiscal year. |
| 000532 | Equipment Expense | \$ | 3,800.00 | \$ | - | 0.00% | |
| 000533 | Finance Indirect | \$ | 505,167.00 | \$ | 168,389.00 | 33.33% | |
| 000534 | Indirect Expense | \$ | 1,000,809.00 | \$ | 333,603.00 | 33.33% | |
| 000535 | Furniture & Fixtures | \$ | 17,400.00 | \$ | 7,884.38 | 45.31% | Corvallis new office furniture - one-time expense. |
| 000537 | Insurance | \$ | 63,697.00 | \$ | 58,603.97 | 92.00% | One-time payment at the beginning of the Fiscal Year. |
| 000540 | Interest Expense | \$ | 17,620.00 | \$ | 8,731.69 | 49.56% | USDA RDF loan payments. |
| 000541 | Loan Legal Expense | \$ | 2,000.00 | \$ | - | 0.00% | |
| 000542 | Legal Services | \$ | 16,650.00 | \$ | 3,953.00 | 23.74% | |
| 000543 | Licenses and Fees | \$ | 72,675.00 | \$ | 30,914.57 | 44.08% | Annual service agreements and software agreements paid at beginning of FY 2018-2019. |
| 000546 | Loan Fees | \$ | 1,000.00 | \$ | 535.71 | 53.57% | Refunded excess loan payoff to borrower. |
| 000549 | Maintenance and Repair | \$ | 128,650.00 | \$ | 28,972.72 | 22.52% | |
| 000550 | Marketing Expense | \$ | 5,650.00 | \$ | 247.28 | 4.38% | |
| 000551 | Taxes | \$ | 3,500.00 | \$ | - | 0.00% | |
| 000553 | Loan Admin Expense | \$ | 132,155.00 | \$ | 36,711.98 | 27.78% | |
| 000555 | Postage | \$ | 63,000.00 | \$ | 16,265.75 | 25.82% | |
| 000558 | Printing | \$ | 10,955.00 | \$ | 1,948.10 | 17.78% | |
| 000561 | Rent | \$ | 656,745.00 | \$ | 222,527.66 | 33.88% | |
| 000564 | Resource Reserve (Program Match) | \$ | 351,081.00 | \$ | 14,277.64 | 4.07% | Match for all programs. |
| 000567 | Supplies | \$ | 104,518.00 | \$ | 36,186.83 | 34.62% | |
| 000568 | Stipend | \$ | 87,477.00 | \$ | 24,973.86 | 28.55% | |
| 000570 | Technology Indirect | \$ | 642,634.00 | \$ | 214,211.32 | 33.33% | |
| 000573 | Telephone | \$ | 152,108.00 | \$ | 54,651.51 | 35.93% | |
| 000575 | Special Event Expense | \$ | - | \$ | 12,882.33 | 0.00% | Special event expenditure (<i>CelebrateLBL</i> and <i>Tapas & Treasures</i>). |
| 000576 | Training | \$ | 113,086.00 | \$ | 32,106.49 | 28.39% | |
| 000577 | Volunteer Recognition | \$ | 11,500.00 | \$ | 5,663.13 | 49.24% | Agency volunteer recognition |
| 000578 | Meal Delivery Travel | \$ | 42,750.00 | \$ | 19,519.08 | 45.66% | Reimbursement for all volunteer program including <i>Meals on Wheels</i> , <i>RSVP Friendly Visitor</i> and <i>Senior Companions</i> . |
| 000579 | Travel | \$ | 145,850.00 | \$ | 46,167.96 | 31.65% | |

| | | | | | | | |
|--------|-------------------------------|-----------|----------------------|-----------|-----------------------|---------------|--|
| 000580 | Transfers Out | \$ | 70,000.00 | \$ | 10,000.00 | 14.29% | |
| 000582 | Utilities | \$ | 70,000.00 | \$ | 21,896.53 | 31.28% | |
| 000583 | Operating Contingency | \$ | 4,153,105.00 | \$ | - | 0.00% | |
| 000584 | Janitorial | \$ | 53,692.00 | \$ | 23,410.78 | 43.60% | New janitorial staff hired at price higher than budgeted amount. |
| 000585 | Unappropriated EFB for future | \$ | 5,479,491.00 | \$ | - | 0.00% | |
| | MATERIALS AND SUPPLIES | \$ | 23,978,823.00 | \$ | 4,947,943.82 | 20.64% | |
| 000595 | Capital Purchase | \$ | 7,000.00 | \$ | 10,678.00 | 152.54% | Replace 2 Heat Pumps, 50% down payment. |
| 000596 | Leasehold Improvement | \$ | 1,091,737.00 | \$ | - | 0.00% | |
| | CAPITAL OUTLAY | \$ | 1,098,737.00 | \$ | 10,678.00 | 0.97% | |
| 000598 | Principal Payment | \$ | 43,333.00 | \$ | - | 0.00% | |
| 000599 | Interest Expense | \$ | 20,000.00 | \$ | 5,156.67 | 25.78% | |
| | DEBT SERVICES | \$ | 63,333.00 | \$ | 5,156.67 | 8.14% | |
| | EXPENSE | \$ | 39,512,994.00 | \$ | 9,266,531.36 | 23.45% | |
| | NET GAIN/(LOSS) | \$ | - | \$ | (2,240,290.81) | | |



1400 Queen Ave SE • Suite 201 • Albany, OR 97322
(541) 967-8720 • FAX (541) 967-6123

MEMORANDUM

DATE: December 6, 2018
TO: OCWCOG Board of Directors
FROM: Lydia George, Interim Human Resources Manager
RE: **Assistant Veterans Service Officer Salary Recommendation**

The Oregon Cascades West Council of Governments (OCWCOG) has contracted with Benton County to staff the Benton County Veterans Service Office for many years. To continue providing quality service to our Veterans, there is a need to create a new classification for an Assistant Veterans Service Officer (AVSO).

The objective in developing this new classification is to be able to meet the requirements and scope of work of the Veterans Service Program, maintain efficient client service, and draw from the knowledge, skills, and experience of our current staffing, to the extent possible, to perform the job duties.

During discussions of determining job responsibilities for the new AVSO classification, we wanted to have a professional level classification that is currently accredited or can become accredited. To receive accreditation, an employee must be certified by the Oregon Department of Veterans Affairs (ODVA). The ODVA holds a four-day, annual training each year to certify trainees.

This classification will be responsible for providing counseling, technical assistance, representation and advocacy for veterans, their dependents, and survivors in obtaining benefits to which they are entitled to under Federal, State, or local laws. Employees in these positions must be accredited or can become accredited within two years from the date of hire through the ODVA. This is a professional level and accredited position similar to OCWCOG's current *Aging and Disability Resource Connection (ADRC) Specialist* classification. The lack of supervisory duties distinguishes this classification from the Veterans Service Officer (VSO).

Per the OCWCOG Board of Directors (Board) adopted *Compensation Philosophy and Objectives*, it is the agency's goal to compensate employees with a total compensation package (a combination of pay and benefits) that is equitable within the organization, reflects the value of employee's work, achieves external competitiveness with comparable public sector organizations, is acceptable to OCWCOG's member jurisdictions, and meets the agency's ability to pay. The State of Oregon, Lane, Lincoln, and Linn Counties were surveyed and were deemed comparable public sector organizations for the similarity of job duties and for their regional proximity.

The data enclosed reflects the total compensation to be slightly above the 5% margin on the high end; however, to maintain internal equity with comparable classifications, I believe a salary range of \$3,257 - \$4,367 per month is a fair and competitive wage.

The Union has agreed with the proposed salary range. This new range will create a change in the current OCWCOG salary chart and will therefore need Board approval.

RECOMMENDATION

Motion to approve the salary range of \$3,257 - \$4,367 per month for the new Assistant Veterans Service Officer classification.

Assistant Veteran Services Officer

Performs eligibility functions, including initial eligibility determinations for VA compensation, pension, medical benefits, and annual income and medical expense reviews. Works with related Veteran's Administration rules, regulations, and forms and computer programs. Serves as primary backup to Veterans Service Officer.

| Organization | Comparable Positions | Salary Structure | | | Benefits Paid by Employer | | | | | | | Salary & Benefits | | |
|---|-------------------------|------------------|-----------------|-----------------|---------------------------|------------|-------------|---------------|----------------------|---------------|-------------------------|-------------------|-------------|-------------|
| | | Low | Mid | High | Pension | Def. Comp. | Health Ins. | Life/LTD/AD&D | Cell Phone Allowance | Car Allowance | *Other ER Paid Benefits | TC Low | TC Mid | TC High |
| OCWCOG | AVSO | 3257 | 3812 | 4367 | 6.00% | \$ - | \$ 2,019 | \$ - | \$ - | \$ - | \$ - | 5471 | 6060 | 6648 |
| State of Oregon | AVSO | 2927 | 3574 | 4221 | 0.00% | \$ - | \$ 2,044 | \$ - | \$ - | \$ - | \$ - | 4971 | 5618 | 6265 |
| Linn County | AVSO | 3168 | 3605 | 4042 | 6.00% | \$ - | \$ 2,400 | \$ - | \$ - | \$ - | \$ - | 5758 | 6221 | 6685 |
| Lane County | AVS Coordinator | 3315 | 3872 | 4428 | 6.00% | \$ - | \$ 1,667 | \$ - | \$ - | \$ - | \$ - | 5181 | 5771 | 6361 |
| Lincoln County | Veterans Services Coord | 3442 | 3547 | 3652 | 11.00% | \$ - | \$ 1,521 | \$ - | \$ - | \$ - | \$ - | 5342 | 5458 | 5575 |
| Surveyed Average | | \$ 3,213 | \$ 3,649 | \$ 4,086 | | | | | | | | 5313 | 5767 | 6221 |
| Total Number of Surveyed Comparables: | | | | | 4 | | | | | | | | | |
| Ratio of CWCOG Salaries to the Surveyed Average.: | | 101% | 104% | 107% | | | | | | | | | | |
| Ratio of CWCOG Total Comp. to the Surveyed Average Total Comp. : | | 103% | 105% | 107% | | | | | | | | | | |

OCWCOG REPRESENTED STAFF

Effective 11/1/2018-10/31/2019

(Includes a COLA of 1.85%)

| |
|-----------------|
| PROPOSED |
|-----------------|

| | | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|-------------------------------------|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Clerical Assistant | <i>Hourly</i> | 12.61 | 13.27 | 13.94 | 14.61 | 15.35 | 16.12 | 16.94 |
| | <i>Monthly</i> | 2186 | 2298 | 2416 | 2533 | 2661 | 2796 | 2936 |
| | <i>Annually</i> | 26242 | 27595 | 28979 | 30397 | 31927 | 33550 | 35236 |
| Meal Site Manager | <i>Hourly</i> | 14.32 | 15.05 | 15.79 | 16.61 | 17.39 | 18.26 | 19.19 |
| Clerical Specialist | <i>Hourly</i> | 14.99 | 15.71 | 16.51 | 17.38 | 18.21 | 19.13 | 20.10 |
| | <i>Monthly</i> | 2599 | 2722 | 2862 | 3010 | 3154 | 3314 | 3483 |
| | <i>Annually</i> | 31178 | 32691 | 34346 | 36113 | 37867 | 39792 | 41781 |
| Transp. Brokerage Specialist | <i>Hourly</i> | 15.28 | 16.07 | 16.84 | 17.69 | 18.57 | 19.48 | 20.45 |
| | <i>Monthly</i> | 2648 | 2778 | 2919 | 3065 | 3217 | 3378 | 3545 |
| | <i>Annually</i> | 31766 | 33343 | 35016 | 36766 | 38629 | 40541 | 42547 |
| Planning Technician | <i>Hourly</i> | 15.62 | 16.39 | 17.23 | 18.07 | 18.98 | 19.93 | 20.92 |
| | <i>Monthly</i> | 2710 | 2841 | 2987 | 3134 | 3292 | 3455 | 3629 |
| | <i>Annually</i> | 32516 | 34089 | 35841 | 37609 | 39490 | 41463 | 43550 |
| Lead Trans Brokerage Spec. | <i>Hourly</i> | 16.02 | 16.88 | 17.69 | 18.55 | 19.51 | 20.46 | 21.47 |
| | <i>Monthly</i> | 2778 | 2919 | 3065 | 3217 | 3378 | 3545 | 3723 |
| | <i>Annually</i> | 33343 | 35020 | 36770 | 38624 | 40535 | 42550 | 44668 |
| Senior Meals Coordinator | <i>Hourly</i> | 16.02 | 16.88 | 17.69 | 18.55 | 19.51 | 20.46 | 21.47 |
| | <i>Monthly</i> | 2778 | 2919 | 3065 | 3217 | 3378 | 3545 | 3723 |
| | <i>Annually</i> | 33343 | 35020 | 36770 | 38624 | 40535 | 42550 | 44668 |
| Administrative Assistant | <i>Hourly</i> | 16.26 | 17.12 | 17.97 | 18.87 | 19.81 | 20.80 | 21.85 |
| | <i>Monthly</i> | 2824 | 2968 | 3116 | 3270 | 3434 | 3604 | 3788 |
| | <i>Annually</i> | 33901 | 35605 | 37388 | 39234 | 41209 | 43262 | 45460 |
| In-Home Assistant | <i>Hourly</i> | 16.32 | 17.12 | 17.97 | 18.87 | 19.81 | 20.80 | 21.85 |
| | <i>Monthly</i> | 2824 | 2968 | 3116 | 3270 | 3434 | 3604 | 3788 |
| | <i>Annually</i> | 33901 | 35605 | 37388 | 39234 | 41209 | 43262 | 45460 |
| Medical Resource Worker | <i>Hourly</i> | 17.12 | 17.97 | 18.87 | 19.81 | 20.80 | 21.85 | 22.93 |
| | <i>Monthly</i> | 2968 | 3116 | 3270 | 3434 | 3604 | 3788 | 3973 |
| | <i>Annually</i> | 35605 | 37388 | 39234 | 41209 | 43262 | 45460 | 47690 |
| Accounting Clerk II | <i>Hourly</i> | 17.97 | 18.87 | 19.82 | 20.80 | 21.85 | 22.94 | 24.09 |
| | <i>Monthly</i> | 3116 | 3270 | 3435 | 3604 | 3787 | 3976 | 4174 |
| | <i>Annually</i> | 37388 | 39234 | 41226 | 43262 | 45444 | 47721 | 50094 |
| Executive Assistant | <i>Hourly</i> | 18.09 | 19.01 | 19.96 | 20.93 | 21.98 | 23.12 | 24.24 |
| | <i>Monthly</i> | 3136 | 3295 | 3459 | 3631 | 3811 | 4005 | 4201 |
| | <i>Annually</i> | 37642 | 39538 | 41512 | 43581 | 45732 | 48057 | 50411 |
| Facilities Maintenance Coord | <i>Hourly</i> | 18.57 | 19.49 | 20.49 | 21.50 | 22.61 | 23.71 | 24.88 |
| | <i>Monthly</i> | 3222 | 3381 | 3550 | 3727 | 3914 | 4111 | 4314 |
| | <i>Annually</i> | 38646 | 40573 | 42593 | 44727 | 46972 | 49313 | 51783 |
| ADRC Specialist I | <i>Hourly</i> | 18.79 | 19.74 | 20.74 | 21.79 | 22.86 | 23.94 | 25.22 |
| | <i>Monthly</i> | 3257 | 3421 | 3592 | 3776 | 3960 | 4153 | 4367 |
| | <i>Annually</i> | 39091 | 41066 | 43104 | 45301 | 47514 | 49839 | 52403 |

OCWCOG REPRESENTED STAFF

Effective 11/1/2018-10/31/2019

(Includes a COLA of 1.85%)

| |
|-----------------|
| PROPOSED |
|-----------------|

| | | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|---|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Assist. Vets. Service Officer | <i>Hourly</i> | 18.79 | 19.74 | 20.74 | 21.79 | 22.86 | 23.94 | 25.22 |
| | <i>Monthly</i> | 3257 | 3421 | 3592 | 3776 | 3960 | 4153 | 4367 |
| | <i>Annually</i> | 39091 | 41066 | 43104 | 45301 | 47514 | 49839 | 52403 |
| Technology Support Spec. | <i>Hourly</i> | 18.82 | 19.68 | 20.57 | 21.49 | 22.47 | 23.59 | 24.78 |
| | <i>Monthly</i> | 3263 | 3411 | 3565 | 3725 | 3895 | 4091 | 4294 |
| | <i>Annually</i> | 39170 | 40940 | 42769 | 44697 | 46751 | 49076 | 51528 |
| Accounting Specialist | <i>Hourly</i> | 18.87 | 19.82 | 20.80 | 21.85 | 22.94 | 24.09 | 25.30 |
| | <i>Monthly</i> | 3270 | 3435 | 3604 | 3788 | 3978 | 4174 | 4385 |
| | <i>Annually</i> | 39234 | 41226 | 43262 | 45444 | 47721 | 50094 | 52611 |
| Eligibility Specialist | <i>Hourly</i> | 19.43 | 20.40 | 21.41 | 22.49 | 23.60 | 24.75 | 26.01 |
| | <i>Monthly</i> | 3367 | 3537 | 3711 | 3901 | 4090 | 4289 | 4509 |
| | <i>Annually</i> | 40404 | 42438 | 44534 | 46797 | 49075 | 51470 | 54108 |
| Licensing & Monitoring Spec. | <i>Hourly</i> | 19.74 | 20.77 | 21.79 | 22.86 | 23.94 | 25.22 | 26.44 |
| | <i>Monthly</i> | 3421 | 3592 | 3776 | 3961 | 4153 | 4367 | 4583 |
| | <i>Annually</i> | 41066 | 43104 | 45301 | 47514 | 49839 | 52403 | 54999 |
| Lead Eligibility Specialist | <i>Hourly</i> | 20.32 | 21.37 | 22.43 | 23.54 | 24.66 | 25.95 | 27.20 |
| | <i>Monthly</i> | 3522 | 3698 | 3886 | 4077 | 4276 | 4497 | 4719 |
| | <i>Annually</i> | 42274 | 44372 | 46634 | 48912 | 51305 | 53945 | 56616 |
| Assistant Planner | <i>Hourly</i> | 20.96 | 21.98 | 23.13 | 24.25 | 25.49 | 26.74 | 28.09 |
| | <i>Monthly</i> | 3632 | 3811 | 4007 | 4203 | 4416 | 4637 | 4868 |
| | <i>Annually</i> | 43598 | 45732 | 48071 | 50429 | 52992 | 55636 | 58407 |
| Assistant Loan Officer | <i>Hourly</i> | 21.55 | 22.63 | 23.74 | 24.94 | 26.16 | 27.48 | 28.86 |
| | <i>Monthly</i> | 3731 | 3918 | 4117 | 4321 | 4537 | 4765 | 5002 |
| | <i>Annually</i> | 44792 | 47036 | 49394 | 51860 | 54441 | 57162 | 60029 |
| Contracts Coordinator | <i>Hourly</i> | 21.55 | 22.63 | 23.74 | 24.94 | 26.16 | 27.48 | 28.86 |
| | <i>Monthly</i> | 3731 | 3918 | 4117 | 4321 | 4537 | 4765 | 5002 |
| | <i>Annually</i> | 44792 | 47036 | 49394 | 51860 | 54441 | 57162 | 60029 |
| Workstation Support Spec. | <i>Hourly</i> | 22.07 | 23.17 | 24.33 | 25.54 | 26.84 | 28.16 | 29.63 |
| | <i>Monthly</i> | 3824 | 4016 | 4221 | 4428 | 4651 | 4883 | 5129 |
| | <i>Annually</i> | 45891 | 48183 | 50637 | 53136 | 55810 | 58597 | 61543 |
| Case Manager | <i>Hourly</i> | 22.23 | 23.37 | 24.53 | 25.74 | 27.05 | 28.41 | 29.81 |
| | <i>Monthly</i> | 3855 | 4050 | 4251 | 4459 | 4688 | 4922 | 5166 |
| | <i>Annually</i> | 46241 | 48612 | 51015 | 53529 | 56262 | 59056 | 61991 |
| Registered Nurse | <i>Hourly</i> | 22.68 | 23.83 | 25.01 | 26.27 | 27.59 | 28.98 | 30.40 |
| | <i>Monthly</i> | 3931 | 4130 | 4337 | 4549 | 4782 | 5021 | 5269 |
| | <i>Annually</i> | 47166 | 49584 | 52035 | 54600 | 57387 | 60237 | 63232 |
| Public Information Specialist | <i>Hourly</i> | 23.21 | 24.39 | 25.61 | 26.90 | 28.22 | 29.65 | 31.14 |
| | <i>Monthly</i> | 4023 | 4228 | 4440 | 4661 | 4893 | 5137 | 5398 |
| | <i>Annually</i> | 48279 | 50729 | 53278 | 55938 | 58708 | 61653 | 64760 |

OCWCOG REPRESENTED STAFF

Effective 11/1/2018-10/31/2019

(Includes a COLA of 1.85%)

| |
|-----------------|
| PROPOSED |
|-----------------|

| | | 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|---|-----------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Transportation Coordinator | Hourly | 23.31 | 24.48 | 25.69 | 27.03 | 28.33 | 29.75 | 31.24 |
| | <i>Monthly</i> | 4042 | 4242 | 4453 | 4677 | 4912 | 5158 | 5414 |
| | <i>Annually</i> | 48487 | 50906 | 53437 | 56127 | 58932 | 61892 | 64966 |
| Information Systems Spec. | Hourly | 23.83 | 24.97 | 26.13 | 27.38 | 28.64 | 29.98 | 31.38 |
| | <i>Monthly</i> | 4130 | 4327 | 4532 | 4742 | 4965 | 5197 | 5442 |
| | <i>Annually</i> | 49584 | 51924 | 54379 | 56893 | 59568 | 62370 | 65300 |
| Lead Case Manager | Hourly | 23.36 | 24.53 | 25.75 | 27.05 | 28.41 | 29.81 | 31.29 |
| | <i>Monthly</i> | 4050 | 4251 | 4459 | 4688 | 4922 | 5166 | 5422 |
| | <i>Annually</i> | 48612 | 51015 | 53529 | 56262 | 59056 | 61991 | 65082 |
| Adult Protective Service Spec. | Hourly | 23.77 | 24.99 | 26.22 | 27.54 | 28.91 | 30.35 | 31.87 |
| | <i>Monthly</i> | 4121 | 4330 | 4547 | 4773 | 5011 | 5261 | 5524 |
| | <i>Annually</i> | 49441 | 51953 | 54544 | 57261 | 60132 | 63131 | 66284 |
| Diversion & Transition Coord | Hourly | 23.83 | 25.01 | 26.27 | 27.59 | 28.98 | 30.40 | 31.91 |
| | <i>Monthly</i> | 4130 | 4337 | 4549 | 4782 | 5021 | 5269 | 5530 |
| | <i>Annually</i> | 49584 | 52035 | 54600 | 57387 | 60237 | 63232 | 66384 |
| Mental Health Specialist | Hourly | 24.25 | 25.49 | 26.74 | 28.09 | 29.49 | 30.95 | 32.50 |
| | <i>Monthly</i> | 4203 | 4416 | 4637 | 4868 | 5111 | 5365 | 5634 |
| | <i>Annually</i> | 50429 | 52992 | 55636 | 58407 | 61334 | 64394 | 67609 |
| CED Planner | Hourly | 25.66 | 26.96 | 28.28 | 29.71 | 31.20 | 32.78 | 34.40 |
| | <i>Monthly</i> | 4449 | 4672 | 4902 | 5150 | 5406 | 5678 | 5960 |
| | <i>Annually</i> | 53374 | 56049 | 58836 | 61797 | 64872 | 68135 | 71527 |
| Network Support Specialist | Hourly | 26.53 | 27.87 | 29.25 | 30.72 | 32.27 | 33.88 | 35.56 |
| | <i>Monthly</i> | 4599 | 4829 | 5072 | 5323 | 5589 | 5869 | 6163 |
| | <i>Annually</i> | 55187 | 57943 | 60858 | 63898 | 67084 | 70426 | 73961 |
| Loan Officer | Hourly | 27.46 | 28.71 | 30.01 | 31.28 | 32.53 | 33.80 | 35.14 |
| | <i>Monthly</i> | 4759 | 4978 | 5199 | 5418 | 5638 | 5858 | 6078 |
| | <i>Annually</i> | 57115 | 59728 | 62397 | 65032 | 67653 | 70302 | 72921 |
| Network Operations Spec. | Hourly | 27.87 | 29.25 | 30.72 | 32.27 | 33.87 | 35.56 | 37.33 |
| | <i>Monthly</i> | 4830 | 5071 | 5324 | 5589 | 5869 | 6162 | 6472 |
| | <i>Annually</i> | 57952 | 60848 | 63893 | 67081 | 70429 | 73949 | 77650 |
| Senior Loan Officer | Hourly | 28.83 | 30.17 | 31.50 | 32.83 | 34.15 | 35.48 | 36.80 |
| | <i>Monthly</i> | 4996 | 5228 | 5460 | 5688 | 5920 | 6152 | 6381 |
| | <i>Annually</i> | 59967 | 62737 | 65525 | 68264 | 71032 | 73804 | 76560 |
| CED Planner II | Hourly | 28.83 | 30.17 | 31.50 | 32.83 | 34.15 | 35.48 | 36.80 |
| | <i>Monthly</i> | 4996 | 5228 | 5460 | 5688 | 5920 | 6152 | 6381 |
| | <i>Annually</i> | 59967 | 62737 | 65525 | 68264 | 71032 | 73804 | 76560 |

OREGON CASCADES WEST COUNCIL OF GOVERNMENTS COMPENSATION PHILOSOPHY AND OBJECTIVES

PHILOSOPHY

OCWCOG employees are our key organizational resource and are essential to the provision of outstanding public service. It is OCWCOG's goal to compensate employees with a total compensation package, (a combination of pay and benefits) that is equitable within the organization¹, reflects the value of the employee's work, achieves external competitiveness with comparable public, and in some situations private, sector organizations², is acceptable to CWCOG's member jurisdictions, and meets the agency's ability to pay.

OBJECTIVES

1. Implement Salary Structures that Balance Internal Equity and External Market

Placement of positions on the salary plan based upon the internal organizational structure 50%, and market data 50%.

2. Balance Compensation Costs with Available Resources

Compensation, a total of benefits and salary, must meet the agency's ability to pay.

3. Provide Flexibility

The agency must maintain the ability to respond to changing conditions and provide flexibility in the compensation system. Review of position placement on the salary plan will occur when the top step of the old and new salary ranges varies by plus or minus 15%.

¹ Equitable within the organization means that positions are compensated fairly, and with comparable worth, relative to other positions in the agency. To insure internal equity, the relative compensation for positions is based on objective criteria (required knowledge, responsibility, social contacts, physical requirements, and work demands).

² External competitiveness with comparable public, and in some situations private, sector organizations, means our combined pay and benefits should be at a level that enables the agency to effectively compete with other organizations for qualified employees based upon identified benchmark positions.

The goal is to compensate our employees equivalent to our comparative organizations (plus or minus five percent of the comparable market). Comparable market is the surveyed average of the market value of benchmark positions as reported by our comparable organizations.

The weighted average is computed by multiplying the number of incumbents by the total compensation rate, and then dividing the sum (products) of those results by the total number of incumbents. This gives a realistic picture of the true "job market."

OREGON CASCADES WEST COUNCIL OF GOVERNMENTS

Title: **Assistant Veterans Service Officer**

Position Classification: Assistant Veterans Service Officer

Department: Community Services Program/Benton County Veterans Service

Reports to: Veterans Service Officer

SUMMARY OF POSITION

This position provides support to the Veterans Service Officer (VSO) by interviewing and assessing the needs of clients and offering assistance with forms, applications, referrals information and claims processing.

ESSENTIAL JOB DUTIES

Performs position duties in a manner which promotes customer service and harmonious working relationships, including treating all persons courteously and respectfully. Engages in effective team participation through willingness to assist and support co-workers, supervisors, and other work related-associations. Develops good working relationships with division and agency staff and supervisors through active participation in accomplishing group projects and in identifying and resolving problems in a constructive manner. Demonstrates openness of constructive feedback and suggestions in an effort to strengthen work performance. Contributes to a positive, respectful, and productive work atmosphere. Regular attendance is required to meet the demands of this job and to provide necessary services.

- Interview and assess the needs of military veterans and their dependents in conjunction with available Federal, State, County, and community programs.
- Based on knowledge of existing programs and their eligibility requirements, determine which entitlements may be available and accessed by each individual client, assist with application processes, advise claimants of how each system works, coordinate and monitor applications/claims for applicable program benefits.
- Independently research, compile and summarize information for a variety of reports or to address and/or resolve issues or problems; prepare information for inclusion into reports; provide project and program management as assigned; which includes coordination with other agencies.
- Work with confidential information with a high degree of professionalism and in accordance with State and Federal Laws (HIPAA, FOIA/PA).
- Represent Veterans Services Office at meetings as directed; provide assistance role to boards and committees related to program.
- Type, design, and compose correspondence, forms, graphics and reports; operate a variety of complex and/or automated office equipment.
- Develop procedures, forms, and other support systems for confidential and efficient claims processing.

OTHER JOB DUTIES

- Provide administrative support as needed.
- Coordinate incoming and outgoing information for Veterans Service Officer.
- Assist in coordinating and scheduling office activities as requested.
- Performs other related duties as assigned by supervisor.

SUPERVISION RECEIVED

Receives direct supervision from the Veterans Service Officer.

SUPERVISORY RESPONSIBILITIES

Supervision of employees is not a responsibility of this position.

MENTAL & PHYSICAL JOB SKILLS

N = Never (0%)

O = Occasionally (21 to 50%)

C = Continuously (81 to 100%)

R = Rarely (1 to 20%)

F = Frequently (51 to 80%)

Mental

(C) Interpersonal Skills

(F) Basic Math (add, subtract, multiply, divide)

(R) Advanced Math (analysis, statistics, significant data or number manipulation)

(C) Written English communication

(C) Coordination of multiple tasks

(C) Initiative

(C) Detail/Accuracy

(C) Reasoning/Judgment/Decision Making

(F) Creativity

(F) Brainstorming/Concept

(F) Research

(C) English Comprehension

(C) Memory

(C) Organization/Planning

(F) Adapting to constant change

(C) Teamwork

(C) Timeliness

(F) Presentation/Teaching

(F) Selling

(C) Negotiation

(C) Client/Service Skills

(F) Persuasion

(F) Mentoring

(F) Management of Stress

Physical

(F) Standing

(F) Sitting

(O) Walking

(O) Stooping

(R) Kneeling

(N) Crawling

(N) Climbing

(F) Talking

(C) Hearing

(O) Reaching

(F) Handling

(C) Eye/Hand coordination

(C) Repetitive motions/hands/wrists

(N) Repetitive motions/feet

(F) Acute color

(N) Tasting/smelling (C) Vision (1-10 ft.)

(F) Vision (10-20 ft.)

(R) Long-range vision (20+)

(N) Pushing

(N) Pulling

(O) Lifting **5 lbs/day**

(O) Carrying **5 lbs/day**

WORKING ENVIRONMENT

Work is performed primarily in an office environment utilizing a personal computer, telephone, and a variety of office equipment. Position requires sitting for long periods of time and performing extensive computer work. Occasional travel may be required to attend meetings or run errands for the program.

MINIMUM QUALIFICATIONS

Experience & Training

Two years of college and coursework or a degree in business, public administration or the social sciences field. Law, Education, or a related field; AND two (2) experience interpreting and explaining programs, benefits or services; including interviewing individuals to obtain personal information or technical information, and processing claims to obtain benefits; OR satisfactory equivalent combination of experience and training which demonstrates the knowledge, skills, and abilities in order to perform the duties of the job.

Knowledge, Skills and Abilities

Knowledge of current Federal and State legislation pertaining to benefits to veterans;
Knowledge of veterans' benefit programs and activities of other agencies which provide services to Veterans;
Knowledge of legal documents and military personnel records necessary to substantiate benefit claims;
Knowledge of the Veteran's Administrative practices and laws;
Knowledge of confidentiality rules regarding client and provider records, investigations, including HIPAA regulations;
Knowledge of Microsoft® Excel, Word, and PowerPoint, database software;
Ability to effectively interview clients to determine benefits eligibility;
Ability to compute and process required paperwork and recognize mathematical errors;
Ability to interact and work effectively with representatives of other social agencies and members of the public;
Ability to apply problem solving techniques;
Ability to effectively communicate both orally and in writing; and,
Ability to work independently.

Licenses, Certificates, & Other Requirements

Possession of Valid Oregon Driver's License or have ability to obtain reliable transportation in order to travel throughout the three-county area.

Current Certification or the ability to work toward certification within two (2) years by the Oregon Department of Veterans Affairs.

Position requires successful completion of a criminal history and driving record check.

This job description in no way states or implies that these are the only duties to be performed by an employee occupying this position. Employees are required to follow any other job-related instructions and to perform any other job-related duties requested by their supervisor.

Requirements are representative of minimum levels of knowledge, skills and abilities. To successfully perform this job, the employee will possess the abilities or aptitudes to perform each duty proficiently.

Created 6/18



2019 Executive Committee Meeting Schedule

Location:

Cascades West Center; 1400 Queen Avenue SE; Albany
Upstairs Conference Room

Video conferencing available at the Toledo Cascades West Center.

Thursdays 9:00 - 11:00 am

February 21

April 25

June 27

August 22

October 24

December 5*

*November meeting change due to the Association of Oregon Counties' Annual Conference and Thanksgiving.



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