

County of Santa Clara

Employee Services Agency

Human Resources

County Government Center, East Wing

70 West Hedding Street, 8th Floor

San Jose, California 95110



Classification Report

Date: October 16, 2023

To: Paul Lorenz, CSCHS - Chief Executive Officer
Santa Clara Valley Healthcare (SCVH)

From: Tracy Pham, Human Resources Analyst
Employee Services Agency-Human Resources

Reviewed by: Oriana Liu, Senior Human Resources Analyst

Subject: Classification Report - Health Care Financial Analyst II

Background

In November 2021, an Enterprise Fund Budget Manager from Finance Admin Department 8451 submitted an executive management-initiated study, requesting that Employee Services Agency - Human Resources (ESA-HR) to determine whether a Health Care Financial Analyst II incumbent is properly classified. ESA- HR accepted the study to evaluate the incumbent's current duties and determine whether the individual is aligned with the current classification within the Health Care Financial Analyst series.

The Finance Admin Dept consisted of two staff, 1.0 FTE Health Care Financial Analyst II and 1.0 FTE Enterprise Fund Budget Manager. The incumbent under study currently reports to the Enterprise Fund Budget Manager. The incumbent is the department-exclusive Health Care Financial Analyst II assigned to support the Santa Clara Valley Healthcare & Hospital System (SCVHHS) Executive Team and Senior Leadership Team with financial analyses, operational metrics, budgets, and ad-hoc requests. The Senior Executive teams of SCVHHS are allocated across three hospitals: Santa Clara Valley Medical Center (SCVMC), O'Connor Hospital (OCH), and St. Louise Regional Hospital (SLRH).

Findings / Analysis

Health Care Financial Analyst (HCFA) series classifications are used throughout Santa Clara Valley Health & Hospital System. HCFAs are responsible for performing duties and supervising various service delivery systems and program activities within SCVHHS. Typically, positions within this series are assigned to projects and activities to support several departments across the Santa Clara Valley Health & Hospital System. The series comprises four levels: Associate, I, II, and Senior Analyst. The placement of positions within this series depends on various factors, including the complexity of financial analyses, the scope of information systems used, the size and number of databases utilized, overall information system expertise, breadth of responsibility, the

exercise of independent judgment, supervision or project management, organizational impact, interaction with others, and job knowledge.

ESA-HR reviewed the completed Position Classification Questionnaire (PCQ) and a desk audit was conducted with the incumbent. Below is the analysis derived from the study by examining the incumbent's current classification as a Health Care Financial Analyst II compared to the higher classification, Senior Health Care Financial Analyst.

The typical tasks for Health Care Financial Analyst II and Senior Health Care Financial Analyst are the same. The primary distinction between the HCFA II and the Senior HCFA levels lies in the broader scope of responsibilities and handling of complex finances, specialized in the Santa Clara Valley Health and Hospital System that may have an impact county-wide and/or enterprise-impact.

For the Health Care Financial Analyst II, the classification is characterized as a full journey/professional level. The assigned duties at this level are moderately complex tasks with a greater degree of independence compared to the Health Care Financial Analyst I position. However, employees at this level may still need guidance from the department supervisor/manager when performing more complex assignments.

On the other hand, the Senior Health Care Financial Analyst classification signifies the advanced journey or lead supervisory level within the series. At this level, individuals are expected to possess specialized expertise in financial analytics and often take the lead on projects that have a significant impact on the Health and Hospital Systems. The incumbent at this level, operate independently and are self-sufficient in their roles.

The HCFA II incumbent, under study, is the sole Analyst supporting Santa Clara Valley Health & Hospital System service line and holds a significant role encompassing complex financial enterprise functions and quantitative analytical tasks within healthcare and hospital finances. The primary responsibilities involve supporting executive teams at three hospitals through clinical financial analyses, operational metrics monitoring, budget management, and addressing ad-hoc requests. Additionally, they serve in supervisory roles, act as subject matter experts, manage complex assignments, and utilize extensive databases to provide finance-based analytical support. This senior classification reflects a higher level of experience and broader knowledge, covering healthcare delivery systems, strategic planning concepts, and the management of complex healthcare utilization and financial issues.

The incumbent spends eighty percent (80%) of his time conducting enterprise-level financial reporting and analysis such as preparing financials and operational metrics for senior executive reports and board packets, preparing biweekly labor reports and monthly management reports for managers to monitor their labor productivity and monthly volume, revenue, and expense variances, preparing Service Line Pro-formas and Cash Pricing Analyses for business development growth opportunities, providing financial support for enterprise-wide projects and supplying statistical data for government agencies and auditors.

The incumbent spends the remaining twenty percent (20%) of his time assisting enterprise-level budgeting and planning by providing management and hospital executives with templates to aid in budget tasks, conducting system support and training to department managers and contract teams.

Based on the analysis, the incumbent's responsibilities closely align with the core functions of the Senior Health Care Financial Analyst classification. The incumbent demonstrates a high degree of independence, engaging in independent research, data validation, and communication across various executive-management levels. Furthermore, the incumbent assumes supervisory roles, leads complex projects, and fulfills the expectations associated with a Senior Health Care Financial Analyst. The comprehensive understanding of specialized financial analytics, proficiency in advanced system applications, and expertise in healthcare finance contribute significantly to the incumbent role, especially in areas impacting hospital operations and clinical strategic direction. Solely engaging and supporting three hospital's executive teams and support for enterprise-wide projects solidify senior-level status.

The incumbent's responsibilities extend beyond the purview of a Health Care Financial Analyst II and are aligned with the role of a Senior Health Care Financial Analyst. This is due to the incumbent's specialized financial analytics expertise and their frequent leadership on projects with a substantial influence on the Health and Hospital Systems. Therefore, it is recommended to reclassify the incumbent from a Health Care Financial Analyst II to a Senior Health Care Financial Analyst.

Salary placement will be in accordance with Personnel Practice A25-661, and the incumbent will be placed on probationary status as indicated by Merit System Rule A25-103.

Recommendations

- Add one (1) Senior Health Care Financial Analyst in BU 921
- Reclassify one (1) Health Care Financial Analyst II to a Senior Health Care Financial Analyst in BU 921.
- Delete one (1) Health Care Financial Analyst II in BU 921.

Fiscal Implications

The maximum base annualized cost of the recommendations is approximately \$8,468 for Fiscal Year (FY) 2023-2024. The annual cost for the recommended action is approximately \$12,943.