



Department of Employee Relations

June 21, 2013

Tom Barrett
Mayor

Maria Monteagudo
Director

Michael Brady
Employee Benefits Director

Deborah Ford
Labor Negotiator

To the Honorable
The Committee on Finance and Personnel
Common Council
City of Milwaukee

Dear Committee Members: Re: Common Council File Number **130254**

The following classification and pay recommendations will be submitted to the City Service Commission on **June 25, 2013**. We recommend these changes subject to approval by the City Service Commission.

In the Department of City Development, one new position of DCD Accounting Specialist, PR 2HX is recommended for classification.

The following classification and pay recommendations were approved by the City Service Commission on **June 11, 2013**.

In the Department of Employee Relations, one position of Benefits Services Specialist III, PR 2DN was recommended for reclassification to Benefits Services Analyst.

The job evaluation report covering the above positions, including the necessary Salary and Positions Ordinance amendments, is attached.

Sincerely,

Maria Monteagudo
Employee Relations Director

MM:fcw

Attachments: 2 Job Evaluation Reports
2 Fiscal Notes

C: Mark Nicolini, James Carroll, Deborah Ford, Nicole Fleck, Richard Marcoux, Martha Brown, Sandra Rotar, Judy Allen, Maria Monteagudo, Mike Brady, Andrea Knickerbocker, Crystal Owens, Richard Abelson, Kenneth Wischer, Daniel Panowitz, Calvin Lee, and Penni Secore (DC48)



JOB EVALUATION REPORT

City Service Commission Meeting Date: June 25, 2013

Department of City Development

Current	Request	Recommendation
New Position	Lead Accountant Senior PR 2JX (\$60,809 - \$85,129)	DCD Accounting Specialist PR 2HX (\$53,519 - \$74,922)

Action Required

In the Salary Ordinance, under Pay Range 2HX, add the title "DCD Accounting Specialist".

In the Positions Ordinance, under Department of City Development, General Management and Policy Development Decision Unit, Finance and Administration, delete one position of "Lead Accountant Senior" and add one position of "DCD Accounting Specialist".

Background

The Department of City Development requested a classification of this new position located in the Finance and Administration Division. The functions of this position were previously handled by a Redevelopment Authority of the City of Milwaukee (RACM) position that recently became vacant. A new job description was provided and discussions were held with Sandra Rotar, Finance and Administration Manager; and Judy Allen, Resource and Administration Manager.

Duties and Responsibilities

The basic function of this position is to provide professional accounting and related financial management services for the Department of City Development including Tax Increment Districts (TID), Business Improvement Districts (BID), Neighborhood Improvement Districts (NID), the Century City Redevelopment Corporation (CCRC), and Redevelopment Authority (RACM) component units and City activities. Duties and responsibilities include the following:

- 55% General Accounting for TID, BID, and NID Activities – act as lead accountant for TID, BID, NID and related City activities; meet all reporting deadlines including annual reviews and payment of BID and NID assessments; assist Comptroller’s Office with TID annual audit; provide interim financial reports to Department Project Managers; provide additional analysis upon request; determine financial liability and submit invoices between City and RACM to reimburse payroll and operating expenses; take lead role in year-end closing of accounts and preparation of financial data; prepare closing journal entries, review ledgers, and distribute City account balances to appropriate ledgers; work with staff from the Comptroller’s Office, City Treasurer’s Office, and Assessor’s Office to determine and analyze the financial health of the City’s TID, BID, and NID; and submit reports to the Wisconsin Department of Revenue regarding TID activities, per State Statute.
- 35% Financial Statements for CCRC – prepare year-end CCRC financial statements including work papers, ‘Prepared by Client’ documents, notes, income statement, balance sheet, cash flow statement and Management Discussion and Analysis; work closely with City and external auditors and staff to precipitate an efficient audit; take lead role in the year-end closing of CCRC accounting including preparation of financial data; prepare closing journal entries, review ledgers, and provide Accounting Managers with City account balances to the appropriate ledgers; assist the RACM Lead Accountant with the preparation of RACM financial statements and other accounting and work papers as needed; and prepare quarterly CCRC settlements (reimbursement requests) for presentation to the CCRC president.
- 10% Other Duties - perform other professional management responsibilities as required; and perform other duties as assigned.

Requirements include a Bachelor's Degree in Accounting and three to five years of progressively responsible accounting or financial analysis experience. Experience in governmental, inter-agency, and complex financial organization accounting is desirable and a Certified Public Accountant designation is preferred. Equivalent combinations of education and experience may be considered. These requirements have not yet been assessed for staffing purposes.

Analysis


Comparisons were made to several other accounting and financial positions in the City including the following classifications.

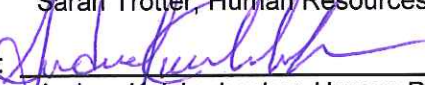
Title	Pay Range (Salary Grade)	Rates of Pay
Management Accountant – Senior	PR 2EX (04)	\$44,194 - \$61,871
Management Accounting Specialist	PR 2FX (05)	\$47,109 - \$65,957
Accounting Specialist	PR 2GX (06)	\$50,206 - \$70,295
Auditor	PR 2GX (06)	\$50,206 - \$70,295
Auditor Lead	PR 2HX (07)	\$53,519 - \$74,922
City Payroll Specialist	PR 2HX (07)	\$53,519 - \$74,922
Assistant Accounting Manager	PR 2IX (08)	\$57,028 - \$79,836
Business Operations Manager-Health	PR 1FX (09)	\$60,809 - \$85,129

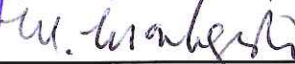
A review of these comparisons indicated that there was not a direct match. The position under study is similar to the classification of Accounting Specialist in Pay Range 2GX (SG 06) but is somewhat stronger due to working more independently and providing professional accounting and related financial management services to several unique programs within DCD including the Tax Increment Districts, the Business Improvement Districts, the Century City Redevelopment Corporation and the Redevelopment Authority. The Accounting Specialist positions are located in the Comptroller's Office and work closely with City Departments to ensure that the City of Milwaukee complies with accounting and financial reporting provisions, grantor guidelines, and City requirements for various grant awards.

Due to the differences in these classifications we recommend creating the unique title of DCD Accounting Specialist in Pay Range 2HX (SG 07). Other Accounting and Financial positions in the Pay Range include Auditor Lead, Budget and Policy Specialist, and City Payroll Specialist. We further note that, due to the unique aspects of this position, a special pay request for recruitment purposes may be considered if needed.

We therefore recommend this new position be classified as DCD Accounting Specialist in Pay Range 2HX.

Prepared by: 
Sarah Trotter, Human Resources Representative

Reviewed by: 
Andrea Knickerbocker, Human Resources Manager

Reviewed by: 
Maria Monteagudo, Employee Relations Director

JOB EVALUATION REPORT

City Service Commission Meeting Date: June 11, 2013

Department of Employee Relations

Current	Request	Recommendation
Benefits Services Specialist III PR 2DN (\$45,210 - \$58,037)	Study of Position	Benefits Services Analyst PR 2EX (\$44,194 - \$61,871)

Action Required – Effective Pay Period 6 (March 3, 2013)

In the Salary Ordinance, under Pay Range 2EX, add the title "Benefits Services Analyst".

In the Positions Ordinance, under Department of Employee Relations-Employee Benefits Division, Medical Benefits Section, delete one position of "Benefits Analyst" and add one position of "Benefits Services Analyst".

Background

The Employee Benefits Division has undergone significant changes over the past several years in both organizational structure and in benefit plans, design, and administration. The duties and responsibilities of the position under study have been directly affected by these changes and a classification study was conducted. A new job description was prepared and discussions were held with the incumbent; and with the position's immediate supervisor, Michael Brady, Employee Benefits Director.

Duties and Responsibilities

The basic function of this position is to administer the Oracle PeopleSoft system so that employees are enrolled in the correct benefits, employee groups are set up correctly, benefit vendors receive the correct payments, and the City can assure proper administration of benefits; plan, organize and coordinate the annual Open Enrollment for benefits; administer the city-wide COBRA (Consolidated Omnibus Budget Reconciliation Act) program that provides the option for continued health insurance at group rates for former employees and their families; and serve as a back-up for other benefit services. Duties and responsibilities include the following:

- 50% Responsible for the administration of the Human Resources Management System (HRMS) Benefits Module Program including updating rules and processing benefit events for eligible employees; updating plans and rates in accordance with labor contracts or provisions of the Milwaukee Code of Ordinances; monitoring and updating the weekly employee eligibility file that is sent to health and dental providers; reviewing the "Benefit Deduction Not Taken Report" and adjusting premiums accordingly; troubleshooting enrollment issues regarding health, dental, life insurance, flexible spending accounts (FSA), long term disability (LTD), sick leave, vacation, and pension to ensure appropriate enrollment is applied; investigating benefit issues as they pertain to payroll; responding to customer inquiries and problems related to benefit plan including evaluating and explaining plans/options that are available and/or making referrals to vendors; orientating new employees on benefits; reviewing, researching, and updating benefit communication documents and reference materials; providing assistance and backup to other Benefits staff as necessary; and performing other duties as requested by the Employee Benefits Director.

- 25% Responsible for the administration of the City-wide COBRA Insurance Program for eligible individuals including identifying eligible participants, generating letters, and processing and enrolling in health or dental benefits; identifying, analyzing, and resolving enrollment issues; preparing monthly Benefits Billing Statements; and reviewing reports, auditing and adjusting insurance premium payments.
- 25% Responsible for the coordination and implementation of the annual City-wide Open Enrollment including meeting with designated representatives from each of the sites to plan, schedule and facilitate each of the Open Enrollment Fairs; overseeing the layout and design of the Annual Open Enrollment Booklet for both active employees and retirees; annually updating and entering new rates and benefit plans in HRMS; providing customer services such as assistance with self-service passwords and enrollment issues; coordinating and preparing both Benefit Information and Confirmation Statements; facilitating informational sessions for active employees in addition to Open Enrollment Fairs; and processing and finalizing benefit elections for the following year.

Requirements include four years of related experience including experience with benefits; and knowledge of the Oracle PeopleSoft system. Other requirements include good diagnostic, analytical and evaluative skills; knowledge of benefit programs including health and dental insurance, long term disability insurance, life insurance, and flexible choices related to the use of pretax dollars for child care, medical costs and parking; and the ability to handle multiple tasks under tight deadlines, work directly with employees regarding issues related to their benefits, and resolve sensitive issues affecting the finances of current or past employees. These requirements have not yet been assessed for staffing purposes.

Changes to the Position

Changes in this position include the following:

- With the implementation of self-service enrollment in 2005 duties now include updating online text entry; and creating and revising self-service instructions to assist employees with enrollment.
- With the elimination of the Employee Benefits Analyst position in Salary Grade 04 in 2009 duties now include responsibility for layout and design of the annual Open Enrollment Booklets; coordination of the Open Enrollment Fairs; and assisting the Employee Benefits Director with benefit presentations.
- Providing assistance to ITMD (Information and Technology Management Division of the Department of Administration) in maintaining, updating and testing provider eligibility files.
- Assisting the Employee Benefits Director with implementation of new Benefits vendors and their account and benefit structures.

Analysis

With the changes listed above this position has grown and evolved so that it is functioning at a higher, more independent level. This position has always been responsible for enrolling employees in the right benefits and making sure the deductions are correct during open enrollment and throughout the year. With the elimination of the Employee Benefits Analyst position in Salary Grade 04 the position under study now has responsibility for organizing and coordinating all the Open Enrollment fairs and associated communications; and the layout and

design of the Open Enrollment Booklets. With the implementation of self-service enrollment this position updates online text entry; and creates and updates the self-service instructions for employees to enroll in benefits.

This position has also been responsible for running tests for ITMD in the past but now is also more involved with "fixes" to the system which may involve modifications or a change in set-up. The tests are also more formalized. This position serves as a functional lead for the Benefits Module of HRMS (Human Resources Management System) and has authority to sign off on Bundles Testing. This position reports directly to the Employee Benefits Director and is expected to implement any changes to benefits that have been developed and approved. The position works very independently and the level of detail and consequence of error is high.

Comparisons were made to other positions in the City including the following.

Title	PR	Rates of Pay
Administrative Services Specialist	2BN (SG 01)	\$36,507 - \$51,106
Claims Adjuster	2CN (SG 02)	\$38,902 - \$54,455
Test Administration Coordinator	2DN (SG 03)	\$41,458 - \$58,037
Claims Adjuster-Senior	2EX (SG 04)	\$44,194 - \$61,871
Administrative Specialist – Senior	2EX (SG 04)	\$44,194 - \$61,871
Business Operations Analyst	2FX (SG 05)	\$47,109 - \$65,957

These comparisons indicated that the level of Pay Range 2EX (Salary Grade 04) is the best fit for the position under study. Similar to the Claims Adjuster-Senior position, which performs higher level adjusting work, and the Administrative Specialist-Senior position, which performs higher level administrative work, this position performs higher level benefits work. The overall responsibility for the open enrollment process has expanded as has the work related to testing and "fixes" related to HRMS. The Business Operations Analyst position in Pay Range 2FX (Salary Grade 05) is at a higher level as the work is broader in scope and includes some of the budgeting and accounting work that was previously performed by the Business Operations Manager in Salary Grade 08.

To reflect the higher level duties we recommend the title of Benefits Services Analyst. We therefore recommend this position be reclassified from Benefits Services Specialist III in Pay Range 2DN to Benefits Services Analyst in Pay Range 2EX.

Prepared by: *Sarah Trotter*
Sarah Trotter, Human Resources Representative

Reviewed by: *Andrea Knickerbocker*
Andrea Knickerbocker, Human Resources Manager

Reviewed by: *Maria Montegudo*
Maria Montegudo, Employee Relations Director