



July 13, 2011  
Department of Employee Relations

Tom Barrett  
Mayor

Maria Monteagudo  
Director

Michael Brady  
Employee Benefits Director

Troy M. Hamblin  
Labor Negotiator

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

Dear Committee Members:

Re: Common Council File Number 110337

The following classification and pay recommendations were approved by the City Service Commission on July 12, 2011.

In the Department of Administration - Information Technology Management Division,

One position of GIS Developer-Project Leader, Salary Grade 011 was retitled to Systems Analyst-Project Leader, Salary Grade 011.

One position of Systems Analyst - Sr, Salary Grade 008 was reclassified to Database Associate, Salary Grade 006.

One position of Systems Analyst - Sr, Salary Grade 008 was reclassified to Programmer II, Pay Range 556.

In Employees' Retirement System,

One position of ERS Deputy Director, Salary Grade 014 held by Martin Matson was recommended for reallocation to Salary Grade 015.

One position of ERS Financial Officer, Salary Grade 011 held by Melody Johnson was recommended for reclassification to ERS Chief Financial Officer, Salary Grade 012.

One position of Member Services Manager, Salary Grade 007 held by Mary Jane Stoffel was recommended for reclassification to Retirement Plan Manager, Salary Grade 010.

One position of Network Coordinator-Senior, SG 006 held by Marcus Collins was recommended for reclassification to Network Administrator, Salary Grade 008.

The job evaluation reports 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  
1 Fiscal Note

C: Mark Nicolini, Renee Joos, James Carroll, Troy Hamblin, Nicole Fleck, Sharon Robinson, Nancy Olson, Gary Langhoff, Jerry Allen, Martin Matson, Melody Johnson, Mary Jane Stoffel, Marcus Collins, Richard Abelson, John English, Kenneth Wischer, Bill Mollenhauer, Daniel Panowitz, and Calvin Lee (DC 48).

**JOB EVALUATION REPORT**

City Service Commission Meeting Date: July 12, 2011  
 Department: Administration, Information Technology Management

<b>Present</b>	<b>Request</b>	<b>Recommendation</b>
GIS Developer-Project Leader SG 11 (\$69,090 - \$96,722)	Systems Analyst-Project Leader SG 11 (\$69,090 - \$96,722)	Systems Analyst-Project Leader SG 11 (\$69,090 - \$96,722)
Systems Analyst-Sr. SG 08 (\$57,028 - \$79,836)	Database Associate SG 06 (\$50,206 - \$70,295)	Database Associate SG 06 (\$50,206 - \$70,295)
Systems Analyst-Sr. SG 08 (\$57,028 - \$79,836)	Programmer II PR 556 (\$48,133 - \$58,690)	Programmer II PR 556 (\$48,133 - \$58,690)

**Action Required**

In the Salary Ordinance, under Salary Grade 06, add the title of "Database Associate".

In the Positions Ordinance, under Department of Administration-Information and Technology Management Division, Enterprise Databases, delete one position of "GIS Developer – Project Leader", and add one position of "Systems Analyst-Project Leader"; under Departmental Applications Support, delete two positions of "Systems Analyst-Sr" and add one position of "Database Associate" and one position of "Programmer II".

**Background**

On June 7, 2011, the Chief Information Officer in the Information Technology and Management Division, Nancy Olson, requested that three positions be repurposed to better meet the business needs of the division. As the result of a retirement in a Salary Grade 11 position which will become effective at the end of pay period 14, each of the affected positions will be vacant at the time these requested reclassifications becomes effective.

In reviewing this request, written documentation in the form of detailed job descriptions prepared by ITMD were reviewed and discussions were held with the business operations manager of the division. The proposed changes are discussed in the narrative that follows.

**Current:** GIS Developer-Project Leader, SG 11  
**Request:** Systems Analyst-Project Leader, SG 11  
**Recommendation:** Systems Analyst-Project Leader, SG 11

A GIS Developer-Project Leader, SG 11 will be transferred to the applications development area to work as a project leader in the applications development area with responsibility for planning directing, coordinating, the work and staff of seven systems analysts and programmers. Notable knowledge, skills, abilities, and competencies include: the ability to plan, coordinate, and implement complex projects; the ability to

supervise, coach, and train staff; the ability to accurately estimate resources, time, and costs required to complete projects; knowledge of application design and management systems; knowledge of advanced programming languages; knowledge of online transaction processing systems; knowledge of database design.

The minimum requirements for this job include five years of professional systems analysis experience in web, microcomputer, midrange and/or mainframe environments and demonstrated ability to lead project teams.

The nature of work performed and level and knowledge/skill and responsibility exercised is consistent with currently established project manager positions in ITMD. It is therefore recommended that this position be reclassified as requested, from GIS Developer-Project Leader, SG 11 to Systems Analyst-Project Leader, SG 11.

**Current: Systems Analyst-Sr, SG 08 (Will be vacant)**  
**Request: Database Associate, SG 06**  
**Recommendation: Database Associate, SG 06**

The Database Associate will provide support for ITMD's Oracle database servers, hardware, virtualized servers, operating systems, and database software; ensure that backup systems for operating systems and databases are performed and run to assure recoverability; ensure the data integrity of databases and high availability of production databases; and work with other City departments and IT staff to assist with their database needs.

Minimum requirements for the job include a bachelor's degree in computer science, management information systems or closely related area and two years of experience in database support, maintenance, and restoration. Experience in managing servers in a storage area network and virtual environment is desired.

ITMD's need for a database professional, as opposed to a systems analyst, reflects broader industry trends. As the Internet expands, along with e-commerce and e-government, organizations experience greater demands to store, organize, and analyze, and protect larger amounts of data. In addition, as more databases are connected to the Internet, data security becomes increasingly important.

The current classification series for nonrepresented Systems Analysts in ITMD is as follows:

Systems Analyst	SG 06
Systems Analyst Senior	SG 08
Systems Analyst-Project Leader	SG 11

Systems Analysts begin employment in SG 06. After two years of successful job experience they are eligible for promotion to Systems Analyst-Sr. The Project Leader functions as a first-line supervisor and project leaders.

The department's request to establish this position at a level equivalent to a Systems Analyst, SG 06 appears reasonable light of the fact that the level of work performed and knowledge/skills required is at approximately the same level as a Systems Analyst,


SG 06. It is therefore recommended that one level of Systems Analyst-Sr/ SG 08 be reclassified to Database Associate, SG 06.

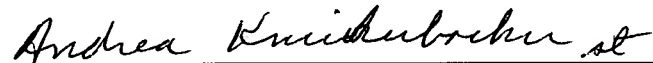
**Current:** Systems Analyst-Sr SG 08 (will be vacant)  
**Request:** Programmer II, PR 556  
**Recommendation:** Programmer II, PR 556

At the time that a position of Systems Analyst-Sr., SG 08 is vacated, the department would like to have the position reclassified to a Programmer II, PR 556 to better meet its business needs. This position will perform duties and responsibilities associated with a computer programmer such as creating, analyzing, modifying, testing, reviewing, documenting, and implementing computer programs and associate information technology objects.

Requirements for the job include a bachelor's degree in information technology, information systems, computer science or related field and two years of programming experience that includes knowledge of such languages as SCLA, Java, MS Visual Studio, XSL, JSON, MS Office, IIs, Rational Application Server, ECLIPSE, and Regular Expressions.

The nature of work performed and level of knowledge/skills required is consistent with the established job classification of Programmer II, PR 556. It is therefore recommended that a position of Systems Analyst, SG 08 be reclassified to Programmer II, PR 556.

Prepared by:   
Laura Sutherland, Human Resources Representative

Reviewed by:   
Andrea Knickerbocker, Human Resources Manager

Reviewed by:   
Maria Monteagudo, Employee Relations Director

**JOB EVALUATION REPORT**

City Service Commission Meeting: July 12, 2011  
Department: Employes' Retirement System

<b>Summary</b>				
		<b>SG</b>	<b>Min</b>	<b>Max</b>
<b>ERS Deputy Director</b>				
Martin Matson		<b>14</b>	<b>\$83,653</b>	<b>\$117,118</b>
Request	ERS Deputy Director	18	\$107,973	\$151,159
Recommendation	ERS Deputy Director	15	\$89,161	\$124,823
<b>ERS Financial Officer</b>				
Melody Johnson		<b>11</b>	<b>\$69,090</b>	<b>\$96,722</b>
Request	ERS Chief Financial Officer	15	\$89,161	\$124,823
Recommendation	ERS Chief Financial Officer	12	\$73,627	\$103,077
<b>Member Services Manager</b>				
Mary Jane Stoffel		<b>07</b>	<b>\$53,519</b>	<b>\$74,922</b>
Request	Plan Administration Officer	14	\$83,653	\$117,118
Recommendation	Retirement Plan Manager	10	\$64,805	\$90,728
<b>Network Coordinator-Senior</b>				
Marcus Collins		<b>6</b>	<b>\$50,206</b>	<b>\$70,295</b>
Requested	Network Coordinator-Sr.	12	\$73,627	\$103,077
Recommendation	Network Administrator	8	\$57,028	\$79,836

All rates effective January, 2008

**Action Required**

In the Salary Ordinance,

- under Salary Grade 15, add the title "ERS Deputy Director";
- under Salary Grade 14, delete the title "ERS Deputy Director";
- under Salary Grade 12, add the title "ERS Chief Financial Officer" and footnote designation "3/" to read as follows: "3/ Recruitment may be at any rate in the salary grade with prior written approval by the Department of Employee Relations and the Chair of the Committee on Finance & Personnel";
- under Salary Grade 11, delete the title "ERS Financial Officer";
- under Salary Grade 10, add the title "Retirement Plan Manager" and footnote designation "4/" to read as follows: "4/ Recruitment may be at any rate in the salary grade with prior written approval by the Department of Employee Relations and the Chair of the Committee on Finance & Personnel";
- under Salary Grade 07, delete the title "Member Services Manager".

In the Positions Ordinance,

under Employees' Retirement System, Fiscal Services, delete one position of "ERS Financial Officer (Y)" and add one position of "ERS Chief Financial Officer (Y)";  
under Membership Services, delete one position of "Membership Services Manager (Y)" and add one position of "Retirement Plan Manager (Y)";  
under Information Systems, delete one position of "Network Coordinator-Senior" and add one position of "Network Administrator".

## **Background**

The Executive Director of the Employees Retirement System (ERS), Jerry Allen, requested that four positions be reviewed in light of a report submitted by McLagan and Associates regarding pay levels for 41 positions entitled *Competitive Compensation Analysis, Employees' Retirement System of the City of Milwaukee*, dated April 7, 2009.

In carrying out its analysis, McLagan collected and summarized comparative pay information for 41 ERS positions from the following organizations:

- 23 public funds located in the Midwest
- 66 national public funds that participate in its annual public fund survey, excluding the largest funds, meaning those with assets under management exceeding \$80 billion
- 73 private sector organizations in the Midwest.

Of these comparator groups, salary survey information from 23 public funds in the Midwest provides the most relevant comparisons for positions in the ERS. Data from the McLagan report showed that all investment related positions and virtually all higher level management positions in the ERS were compensated between the 30<sup>th</sup> and 39<sup>th</sup> percentile of the comparable positions in Midwestern public funds. In response to this situation, the Department of Employee Relations recommended adjustments in salary grades for the Chief Information Technology Officer, Chief Investment Officer, and two Investment Analysts. These recommendations were approved by your Commission in 2010.

This report addresses the following four positions that have not been previously studied:

- ERS Deputy Director SG 14
- ERS Financial Officer SG 11
- Member Services Manager SG 07
- Network Coordinator-Senior SG 06

In studying this request, written documentation in the form of revised job descriptions for each position were reviewed, interviews were conducted with each affected employee, and discussions were held with the ERS Deputy Director and ERS Executive Director.

## **The Employees' Retirement System**

The mission of the Employees' Retirement System (ERS) is to faithfully administer a multi-employer retirement plan, in all its variations, as set forth the City Charter; provide services to active employees, retirees, beneficiaries; maintain all required member records and demographic information; administer health plans for retirees; administer the City's group life insurance program; and invest and manage the funds of the Trust, currently \$4.4 billion, in a

prudent and vigilant manner. The Employees' Retirement System has 11,000 active members and 15,000 retirees. Each month the ERS issues \$23 million in retirement benefits to 15,000 retirees and beneficiaries.

The following employers participate in the Employees' Retirement System:

- All departments and offices of the City of Milwaukee
- Milwaukee Metropolitan Sewerage District
- Veolia Environmental Services Solid Waste, North America
- Milwaukee Area Technical College
- Wisconsin Center
- Housing Authority of the City of Milwaukee
- Redevelopment Authority of the City of Milwaukee
- Milwaukee Public Schools

The ERS administers the following benefits programs for sworn employees in the Fire Department; sworn employees in the Police Department, general City employees, and elected officials:

- Service retirement
- Disability retirement
- Separation benefits
- Death benefits
- Survivorship options
- Group life insurance
- Retiree health and dental insurance

In addition, the ERS oversees the City's contributions to Social Security and Medicare.

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**ERS Deputy Director, SG 14**

Martin Matson

Request: ERS Deputy Director, SG 18

Recommendation: ERS Deputy Director, SG 15

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This position functions as the operations director for the department. As defined by the ERS, key responsibilities of the operations director include: providing leadership to the managers and staff of Fiscal Services, Member Services and Information Technology; developing a strategic vision, and the policies and operating plans required to implement the plan; monitoring and evaluating the department's programs, operations, and services; directly managing all contracts for services; and investigating numerous issues related to the administration of retirement benefits. As expected, the position's responsibility for establishing and maintaining business relationships inside and outside of City government is a key competency.

A prominent feature of this position is the development and implementation of annual goals and objectives for each division in concert with the management team as part of the department's strategic plan. The Deputy Director monitors goals and objectives, makes modifications as necessary, and submits required progress reports to the Board. In addition, this position continuously evaluates business processes, sometimes with the assistance of outside consultants, to increase the effectiveness of operations and services. The Deputy, for example, served as the lead manager for the installation of the department's information technology

system, called MERITS. This was a major multi-phase project spanning four years affecting virtually all work processes throughout the ERS.

Another prominent part of this job is directly managing many contracts for services including actuarial services, financial auditing, internal auditing, group life insurance, facilities rental, facilities maintenance, office equipment maintenance, banking, and five separate service contracts for information technology work. The Deputy Director to negotiate contracts, establishes deliverables and performance standards, monitors services and work in process; controls costs; and maintains effective business partnerships with all service providers. Other major areas of responsibility of the job include coordinating issues involving litigation and legal advice; and overseeing all policies and procedures for the Department, including those pertaining to human resources. It should also be noted that the Deputy Director is a fiduciary of the Employees' Retirement System and also serves as the Executive Director in his absence.

The qualifications for this position include a bachelor's degree in business, public administration or related area and ten years of experience in the financial services sector that includes compliance in a public pension fund environment. A number of years of this experience should include leading, managing, and supervising staff and processes. These qualifications have not been verified for purposes of staffing.

A well qualified candidate for this job would be expected to have a thorough knowledge of public employee retirement systems and benefit programs, including federal regulatory and tax requirements. The capacity to work effectively with all levels of personnel in the governmental and private sectors, including active and retired employees and their representatives, is imperative. It is also critical that the Deputy Director have the capacity to evaluate and implement internal operating standards and procedures to comply with regulations and improve the efficiency and effectiveness of operations.

The request on the part of the ERS to review the pay level of the Deputy Director is based upon salary survey information reported by McLagan in April of 2009. As shown in the following table, the ERS Deputy Director was and is compensated approximately 20% less than the 50th percentile (P50) of salaries for comparable positions in all public funds.

#### Salary Survey Information for ERS Deputy Director

Current Effective January, 2008					Survey Data McLagan April, 2008			
Title	Current Annual	SG	Min	Max	P25	P50	P75	
ERS Deputy Director	\$106,828	14	\$83,653	\$117,118	No Data	\$131,900	No data	Data is for all public funds; No data available for subset of Midwestern funds.

There are, however, some questions about this data. Firstly, it is derived from salaries paid to comparable positions at all public funds, not a subset of Midwestern public funds. It is assumed that data from Midwestern funds was not reported because not enough comparable positions existed in Midwestern public funds to provide valid data. As shown elsewhere in McLagan's data, public funds outside of the Midwest pay higher salaries than those located in the Midwest. In many cases these higher salaries are paid by very large retirement systems having significantly greater assets under their control than the ERS. The median of this data (P50) is consequently skewed toward larger pension systems paying higher salaries. Secondly, no data was reported for the 25<sup>th</sup> or 75<sup>th</sup> percentiles. This is problematic because good salary survey data should contain a full range of data, from the 20<sup>th</sup> or 25<sup>th</sup> percentile through the 75<sup>th</sup>



or 90<sup>th</sup> percentile of reported salaries. An absence of data suggests that the number of comparable positions may be too small to provide valid data.

An assessment of this position must, however, also consider the complexity of ERS's operations, since the Deputy Director functions as the department's operations manager. The business rules determining retirement benefits are extraordinarily complex, governed by Chapter 36 of the City Charter, labor contracts for 19 different bargaining spanning 40+ years, and more than 1,800 legal opinions. According to the consultant who performed an organizational review of the ERS in 2009, this extraordinary level of complexity is more akin to that found in much larger retirement systems. Such as the Tennessee Consolidated Retirement System which manages separate plans for 500 employers. and the ERS may in fact "be one of the most complex public pension agencies in the United States." (*Organizational Review, Final Report*, L.R. Wechsler, May 14, 2009, p.50)

Another aspect of the job that merits additional consideration is the responsibility and skill associated with developing and maintaining business relationships with a variety of individuals inside and outside of City government, including members of the Annuity and Pension Board, elected officials, participating employers, financial institutions, legal counsel, employees, retirees, many contractors and vendors, and others in matter of significance. This competency is critical administering contracts and coordinating matters involving litigation.

The most relevant comparisons to the Deputy Director may be found in other top management positions in City government having significant responsibility for financial operations, such as those found in the Comptroller's Office and Office of the City Treasurer. The comparative salary grade relationships for the City Comptroller/Deputy and City Treasurer/Deputy are shown below:

**Salary Grade Relationships  
Comptroller/Deputy and City Treasurer/Deputy**

Comptroller	SG 17	City Treasurer	SG 17
Deputy Comptroller	SG 15	Deputy Treasurer	SG 15

Although salary survey data regarding the ERS Deputy Director may or may not be valid, the complexity of operations for which this position is responsible and responsibility for business relationships indicates that the pay level should be raised to Salary Grade 15, equivalent to the Deputy Comptroller and Deputy City Treasurer, both of which are allocated to Salary grade 15.

It is therefore recommended that the ERS Deputy Director, SG 14, be reclassified to ERS Deputy Director, SG 15.

**ERS Financial Officer, SG 11**

Melody Johnson

Request: ERS Chief Financial Officer, SG 15

Recommendation: ERS Chief Financial Officer, SG 12

The ERS Financial Officer manages the operations of the accounting and finance sections of the department. Key responsibilities include developing and managing an annual budget (\$28 million proposed for in 2011) and overseeing all the accounting functions, record keeping, benefit calculations; and reporting requirements of a multi-employer retirement plan with assets of \$4.4 billion and 26,000 active and retired members.

This Officer provides leadership and managerial direction for a staff of eleven in the following areas: general accounting; reporting; benefit calculations; monthly payments to retirees; the collection and reconciliation of employer contributions from participating agencies; detailed account management required to reimburse the City for most administrative costs; and budget development and management. The Financial Officer ensures that the ERS adheres to generally accepted accounting principles; establishes work standards and procedures, trains, coaches, develops, and supervises employees; improves work processes; develops and prepares reports for other City departments, to and for ERS management and the Annuity and Pension Board; controls costs; and monitors investment data. One key responsibility is approving all the financial transactions submitted by Northern Trust, the custodian of the retirement system's assets, and Wells Fargo, the retirement system's financial institution.

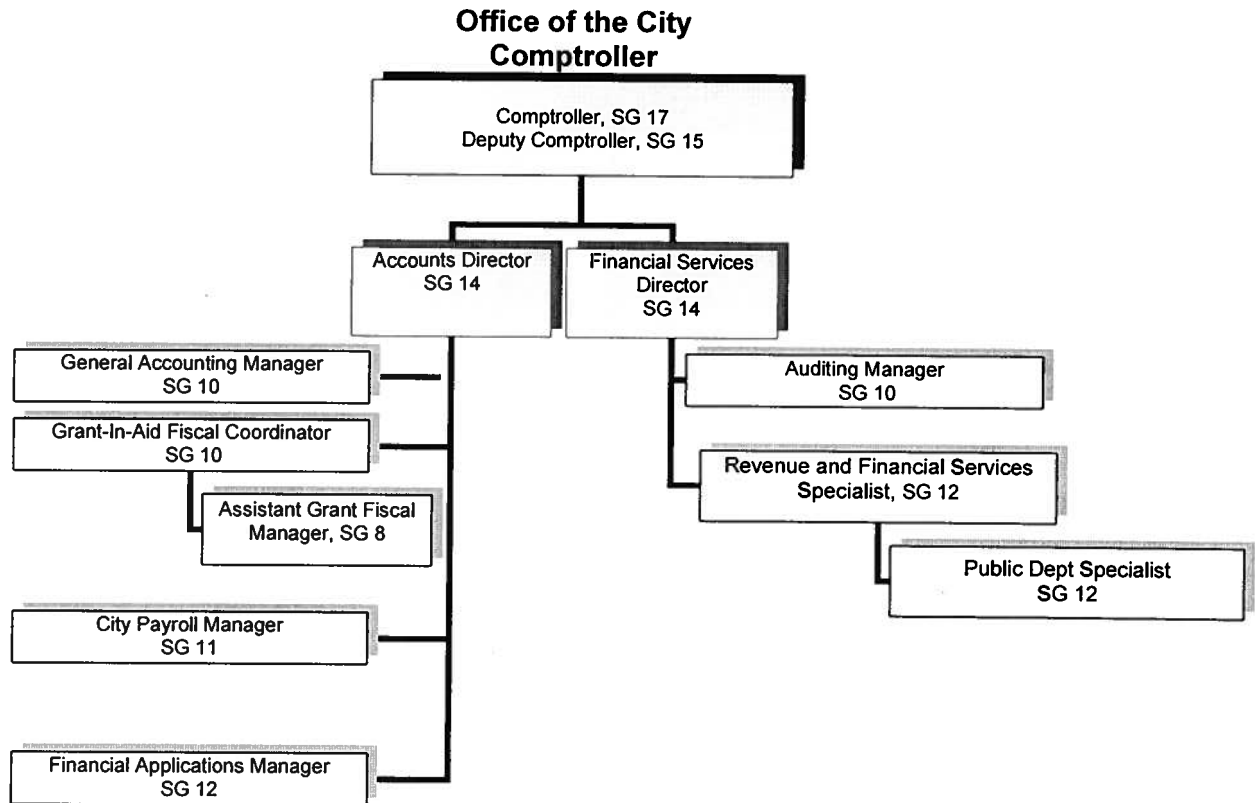
Noteworthy knowledge, skills, abilities, and attributes required for successful job performance include: a working knowledge of accepted accounting principles and processes, the ability to scrutinize financial data regarding investments; knowledge of public pension systems; an ability to establish and maintain effective business relationships with a variety of contacts inside and outside of City government; the ability to manage financial work processes; the ability to lead, supervise, train, coach, and motivate staff; and absolute integrity. The minimum requirements for this position typically include a bachelor's degree in accounting or finance and five years of experience managing the financial operations of a public finance department in a public agency, two years of which include working in a leadership position. These requirements have not been validated for purposes of staffing.

#### Salary Survey Information for ERS Financial Officer

Current Effective January, 2008					Survey Data McLagan April, 2008			
Title	Current Annual	SG	Min	Max	P25	P50	P75	
ERS Chief Financial Officer	\$73,910	11	\$69,090	\$96,722	\$90,300	\$109,200	\$130,500	Midwestern public funds, 2008

Salary survey information for this position, as reported by McLagan, was obtained from 23 public funds located in the Midwest. This provides a very sound basis for comparing positions in the ERS with the relevant labor market. In 2008, the 50<sup>th</sup> percentile (P50) of salaries for chief financial officers was \$109,200. The current maximum rate of pay that the ERS Financial Officer can obtain is 11.4% less than the mean (50<sup>th</sup> percentile) of all reported salaries for this job. Furthermore, the actual salary of the manager performing the job is 32% less than the 50<sup>th</sup> percentile. This data indicates that both the salary grade and the manager's current rate of pay are not competitive with the labor market, in this case defined as Midwestern public funds.

In determining an appropriate pay level, however, salary data is one part of the equation. It is also necessary to consider the position from an internal point of view, which means consideration of the City's job classification structure and a comparison with the level of responsibility exercised and knowledge/skill associated with other high-level management positions involved with financial and accounting operations. To that end, positions in the Comptroller's Office may be used as a basis of comparison, in addition to the position of Investments and Financial Services Manager, SG 12, in the City Treasurer's Office. Below is a high-level organization chart of the Comptroller's Office.



The Comptroller's Office exercises fiscal control over the activities of approximately 40 City departments and agencies. Key responsibilities include establishing accounting policies and procedures for all City departments; preparing the City's Comprehensive Annual Financial Report and State of Wisconsin Report which helps determine state shared revenues; managing a public debt program of \$750+ million; preparing operational, financial and legal compliance audits of City department operations; administering fiscal control of the City's Community Development Block Grant program and all federal and state grants to Milwaukee; preparing the City's single audit report; administering payroll for 7,600 employees; and preparing independent financial analyses of proposed development projects and independent estimates of City revenues for the annual City budget

The Accounts Director, SG 14, oversees accounting operations, the fiscal management of grants-in-aid, the City payroll, and information technology systems related to human resources and financial information. The Financial Services Director, SG 14, is in charge of auditing, public debt management and financing, and deferred compensation. Subordinate managers have responsibility for specific areas such as auditing, the fiscal management of grants-in-aid, and management of public debt are. These "division managers" are allocated to Salary Grades 10, 11, and 12.

The Investments and Financial Services Manager, SG 12, in the City Treasurer's Office may also be used as a basis of comparison. Key responsibilities for that position include management of all cash and funds in the custody of the City Treasurer; development of

investment strategies; investment of funds on a daily basis; management of banking relationships; oversight of payroll functions related to employee judgments; and oversight of the general fund accounting fund which has an annual dollar volume exceeding \$14 billion; administration of the police pension fund; establishment and maintenance of standard operating procedures; and supervision of a staff of five. In 2009 the investments made by this Manager yielded \$1.1 million.

Requirements for the Investment and Financial Services Manager in the Treasurer's Office include a degree in accounting or finance and five years of management experience in the financial services sector, a number of years of which included portfolio management and the leadership of staff and operations. Well qualified applicants for this job would be expected to possess a C.P.A. or C.C.M designation. These requirements have not been validated for purposes of staffing.

Considering the responsibility exercised by each "division manager" in the Comptroller's Office allocated to Salary Grades 10, 11, and 12, and the fact that the Investments and Financial Services Manager in the City Treasurer's Office, is allocated to Salary Grade 12, it does not appear that a good case can be made to adjust the salary grade of the ERS Financial Officer beyond Salary Grade 12. The data from McLagan, however, though, shows the inadequacy of the salary grade for this position.

Due to the fact that salary survey data indicates the position is undercompensated *vis a vis* its peers, we are recommending a two-part approach to this issue: 1. Reclassify this position from Salary Grade 12 with the new title of ERS Chief Financial Officer and 2. Allow appointment to the ERS Chief Financial Officer, SG 12, at any rate in the range, contingent upon prior written approval from the Chairman of the Committee on Finance and Personnel and the Employee Relations Director. Two other managers in the ERS, that of Chief Investment Officer and ERS Chief Information Officer, have the same degree of flexibility that is recommended here.

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**Member Services Manager, SG 07**

Mary Jane Stoffel

Request: Plan Administration Officer, SG 14

Recommendation: ERS Plan Administration Officer, SG 10

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The Member Services Manger leads and directs a staff of 15 employees who provide direct customer service to active employees, retirees, and beneficiaries regarding regular retirements for sworn Fire Department and Police Department employees; regular retirement for general City employees; applications for duty disability retirement; applications for "regular" disability retirement; continuation of dental insurance through COBRA; and health and dental plans for retirees retirement benefits.

During 2010, the staff in the membership services division conducted 4,700 retirement counseling sessions; implemented 4,140 changes in health plans for retirees during open enrollment, administered life insurance benefits for 188 beneficiaries, enrolled 457 new employees into the system, and processed 803 retirements. The Membership Benefits Manager is personally involved in the most difficult or sensitive retirement counseling sessions which may arise from position eliminations or the onset of disability.

Oversight of ERS's communications program is another important component of this job. This involves overseeing the creation and distribution of all communications to members and retirees, including website content, and planning and carrying out group pre-retirement sessions. The position is also responsible the maintenance of all demographic information for members and beneficiaries, something critical for benefits administration and the production of

the annual actuarial review of the plan. In conjunction with communications, this manager oversees the document imaging area where technicians scan all documents received by the ERS and classify them into categories for easy retrieval. This scanning operation is an integral part of the department's automated work flow process.

Due to the complexity of benefits administered and changes in rules regarding pensions, the ongoing training, coaching, and supervising employees is a critical component of the job. The Member Services Manager models excellent customer service, establishes job performance standards, provides technical training to employees, and coaches employees in the behaviors involved in customer service; and creates written materials for employees to use in performing their work.

As a member of the management team, the Member Services Manager participates in the establishment of departmental goals and objectives, creates work procedures and guidelines used in her area and department-wide, represents the department in litigation; and participates in department-wide projects. The Member Services Manager, for example, played a significant role in the installation of the MERITS system from 2002 to 2006.

Noteworthy knowledge, skills, abilities, and attributes required for successful job performance include: an in-depth knowledge of retirement plan administration in the public sector, including disability retirement; health plan administration; and group life insurance administration; understanding of how benefit plans interact and affect individuals' benefits; ability to research and analyze difficult benefits problems and provide sound answers based upon applicable rules and regulations; excellent oral and written communication skills; ability to solve difficult customer service problems; ability to understand, analyze, and improve work processes; ability to learn and apply knowledge to multiple plan design features; ability to demonstrate empathy to individuals; ability to use databases and all standard office hardware and software at a high degree of proficiency; ability to establish and maintain effective business relationships with a variety of contacts inside and outside of City government.

The minimum requirements for this position include a bachelor's degree in business, human resources management, or related area and five years of work experience in retirement plan administration, several years of which must have been in a leadership capacity. These requirements have not been validated for purposes of staffing. McLagan and Associates reported the following salary survey information for the Member Services Manager.

**Salary Survey Data for Member Services Manager**

Current Effective January, 2008					Survey Data McLagan April, 2008			
Title	Current Annual	SG	Min	Max	P25	P50	P75	
<b>Member Services Manager</b>	\$68,345	7	\$53,519	\$74,922	\$87,700	\$102,000	\$132,200	Midwestern public funds, 2008

The above salary survey data has been compiled from salaries paid to plan administrators in Midwestern public funds, which provides a very good basis of comparison. As may be seen, the current maximum of the pay range for the ERS's Member Services Manager does not reach the first quartile (P25) of salaries reported for comparable positions. Furthermore, the actual rate of pay for the Member Services Manager is \$33,655 (33%) less than the 50<sup>th</sup> percentile (P50) of salaries reported. This clearly shows that this position is not compensated at a level commensurate with the applicable labor market.

Due to the existence of such compelling salary survey data, and the lack of truly comparative positions in City government, we are recommending that this position be reclassified to a Retirement Plan Manager in Salary Grade 12. To address the issue of the manager's current actual rate of pay, we further recommend that appointment to the Retirement Plan Manager be at any rate in the range contingent upon prior written approval from the Chairman of the Committee on Finance and Personnel and the Employee Relations Director

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**Network Coordinator-Senior, SG 06**

Marcus Collins

Request: Network Coordinator-Sr., SG 12

Recommendation: Network Administrator, SG 8

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The primary purpose of this position is to design, maintain and administer computer networks and related computing environments including hardware, systems software, applications software, and all configurations for the Employees' Retirement System. The ERS's network consists of 40 servers located in three server rooms, one of which is in Madison, with a distributed network between sites. The U.S. Department of Labor defines this type of job as a Network and Computer Systems Administrator or Computer Network Architect in its standard occupational classification scheme.

Reporting to the Chief Information Officer, SG 16, this position researches, prices, and purchases all the hardware, network devices, services, and equipment required to maintain both the physical network and desktop computers. The Coordinator has established a rolling replacement plan for all servers, switches, printers, plotters, workstations, and software in the ERS. Prior to purchase, all purchase orders are approved by the Deputy Director. There are two contracted database administrators in the work area, one of whom provides backup for the Network Coordinator in his absence.

In carrying out duties and responsibilities, this position works with a number of contractors and vendors who provide services. The Department of Public Works, for example, provides the cabling required for network changes. When major changes are required, such as a change in configuration, this position selects a contractor to perform the work so that it may be completed more quickly and efficiently. As with all information technology jobs, this position troubleshoots problems involving hardware, software, and network issues, replacing defective components when necessary. The Coordinator is currently involved in a major project that involves virtualizing the department's servers.

One of the most critical responsibilities of the job is to plan, coordinate and implement network security measures to protect data, software, and hardware. A related responsibility is monitoring network performance to determine whether adjustments need to be made, and determining where changes will need to be made in the future. Finally, in what might be considered a "left over" responsibility from when the department's computing environment was significantly smaller in scale, this position administers a Microsoft Exchange mail server.

Notable knowledge, skills, abilities, and attributes required to successfully perform this job include: knowledge of information technology security methods; knowledge of disaster planning and recovery methods; knowledge of general computer architecture, including database management and memory allocation; knowledge of hardware platforms; knowledge of communications protocols, Intranet/Internet, and databases; ability to troubleshoot local area

networks and personal computers; ability to understand technical document protocols, including manuals, schematics, procedures, and specifications; general familiarity with communications protocols, telecommunications, and information processing environments; ability to coordinate and facilitate the work of others; knowledge of backup and recovery methods, wiring capacities and limitations, web technologies.

The minimum requirements for the job include a bachelor's degree in computer science, management information systems or closely related field and five years of work experience in network administration and project management, and certification as a Microsoft Systems Engineer. These requirements have not been validated for staffing purposes.

As with the other positions included in this report, the basis for the request to study the position was the salary survey data reported by McLagan which is shown in the following table.

**Salary Survey Data for Network Coordinator-Sr.**

Current Effective January, 2008					Survey Data McLagan - April, 2008			
Title	Current Annual	SG	Min	Max	P25	P50	P75	
Network Coordinator-Sr.	\$70,295	6	\$50,206	\$70,295	\$74,500	\$98,000	\$99,900	Midwestern funds; 2008

The data shows that the maximum for the salary grade of the Network Coordinator-Sr does not reach the 25<sup>th</sup> percentile and is in fact is 28% (\$27,705) below the 50<sup>th</sup> percentile. This data indicates that this position is not compensated in a competitive manner.


In order to properly assess this position, though, other similar positions in City government must also be considered. The Department of Public Works has a number of employees who design and maintain the hardware, servers, circuits, switches, and routers in the physical/electronic network used by all City departments. The jobs in this occupational group are as follows:

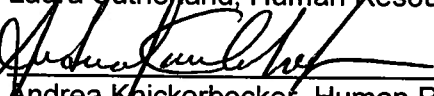
**Telecommunications Analyst Series  
2008 Rates**

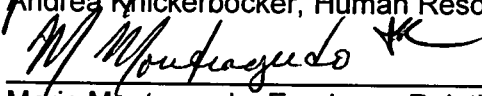
Title	SG	Minimum	Maximum
Telecommunications Analyst-Assistant	04	\$44,194	\$61,871
Telecommunications Analyst-Associate	06	\$50,206	\$70,295
Telecommunications Analyst-Senior	08	\$57,028	\$79,836
Telecommunications Analyst-Project Leader	11	\$69,090	\$96,722

In this schematic, the job classification in Salary Grade 08 represents the most highly skilled, knowledgeable, and experienced Telecommunications Analyst not responsible for supervising the work of others.

It appears, then that the Network Coordinator would be most appropriately placed in Salary Grade 08. For that reason, it is recommended that one position of Network Coordinator-Sr. be reclassified to Network Administrator, SG 08.

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