



Department of Administration  
Intergovernmental Relations Division

**Cavalier Johnson**  
Mayor

**Sharon Robinson**  
Director of Administration

**Kimberly Montgomery**  
Director of Intergovernmental Relations

September 8, 2022

Harper Donahue, IV, Director  
Department of Employee Relations  
City Hall, Room 706  
Milwaukee, WI 53202

Dear Mr. Donahue,

The Intergovernmental Relations Division (IRD) of the Department of Administration requests the re-exemption of the position of Legislative Fiscal Manager-Sr., Pay Range 2MX.

The Legislative Fiscal Manager – Senior position has been vacant since March 3, 2022. The person holding this position works directly with other units of government at the state, county, and federal levels. The incumbent often corresponds or speaks directly with elected officials, handling issues of great sensitivity. In matters involving proposed legislation, the incumbent must not only reflect the philosophy of the administration on matters of significance to the city, but must adhere to the mandates of the city legislative committee in a way reflective of the adopted policy.

Thank you in advance for your consideration of our request. Please call me at 414-286-8564 if you have any questions.

Sincerely,

Kimberly Montgomery, Legislative Liaison Director  
Department of Administration



## Department of Employee Relations

**Cavalier Johnson**  
Mayor

**Vacant**  
Harper Donahue IV

**Renee Joos**  
Director  
Employee Benefits

**Nicole Fleck**  
Labor Negotiator

TO: Board of City Civil Service Commissioners

FROM: Kristin Hennessy Urban  
Human Resources Manager

DATE: September 9, 2022

RE: Request from the Department of Administration – Intergovernmental Relations to re-exempt the position of Legislative Fiscal Manager-Sr.

<b>Position Title</b>	<b># of Positions</b>	<b>Pay Range</b>
Legislative Fiscal Manager –Sr.	1	2 MX (\$76,988- \$107,782)

Please find attached a request from Legislative Liaison Director Kimberly Montgomery to re-exempt the position of Legislative Fiscal Manager – Sr., as well as a job description for the position.

The Legislative Fiscal Manager – Sr. manages and implements intergovernmental priorities as identified by city departments and elected officials, promotes and advances the city’s legislative and policy agenda at various levels of government and seeks and secures intergovernmental funding opportunities.

The incumbent will not only deal with sensitive and confidential information, but must be highly responsive to and in alignment with the policy direction and priorities of the mayor and other elected officials. Additionally, this individual will provide policy and funding advice related to legislative and intergovernmental issues to the mayor and to other elected officials.

For the reasons cited above, I recommend that the request to re-exempt the position of Legislative Fiscal Manager –Sr. be granted.

Please contact me at 414.286.8643 should you have additional questions.

# JOB DESCRIPTION

FOR DER USE ONLY	
Vacancy No. _____	
City Service Commission: _____	Finance Committee: _____
Fire & Police Commission: _____	Common Council: _____

**Instructions:** Complete all sections except No. 11. Refer to the "Guidelines for Preparing Job Descriptions" for instructions on completing specific items.

<b>1. Date Prepared/ Revised:</b> 09/02/2022	<b>2. Present Incumbent:</b> Vacant	<b>Is incumbent underfilling position?</b> YES <input type="checkbox"/> NO <input checked="" type="checkbox"/>		
<b>3. Date Filled:</b>	<b>4. Previous Incumbent:</b> Jodie Tabak	If YES, indicate underfill title in box 10.		
<b>5. Department:</b> Administration, Dept. of		<b>Bureau:</b>	<b>Unit:</b>	
		<b>Division:</b> Intergovernmental Relations	<b>Section:</b>	
<b>6. Work Location:</b> City Hall, Room 606		<b>Telephone:</b>	<b>Work Schedule:</b>	
		<b>Email:</b>	Hours: 8 AM / Days: 4:45 PM (Flexible)	
<b>7. Represented by a Union?</b> NO	<b>8. Bargaining Unit:</b> Management, General City If in District Council 48, chose a Local: None		<b>9. FLSA Status:</b> EXEMPT	
<b>10.</b>	<b>Official Title:</b> Legislative Fiscal Manager-Sr		<b>Pay Range</b>	<b>Job Code</b>
			2MX	5317
	<b>Underfill Title (if applicable):</b> Legislative Fiscal Manager		2LX	
	<b>Requested Title (if applicable):</b>			
<b>Recommended Title (DER Use Only):</b>		Approved by: _____		
		Date: _____		

**11. BASIC FUNCTION OF POSITION:**

Manages and implements intergovernmental priorities as identified by city departments and elected officials. Promotes and advances the city's legislative and policy agenda at various levels of government. Seeks and secures intergovernmental funding opportunities. Researches and prepares reports on policy issues affecting the City. Performs duties independently in the absence of the Legislative Liaison Director.

**12. DESCRIPTION OF JOB** (Check if description applies to **Official Title**  or **Underfill Title** ):

**A. ESSENTIAL FUNCTIONS/Duties and Responsibilities:** (Refer to the "Guidelines for Preparing Job Descriptions" for instructions on determining Essential Functions.)

% of Time	ESSENTIAL FUNCTION
15	<ul style="list-style-type: none"> <li>Analyzes legislative bills to determine whether they affect the City of Milwaukee and makes recommendations on positions to be taken thereon. Works closely in coordination with other city departments to develop and/or monitor proposed and pending legislation at various levels of government.</li> </ul>
15	<ul style="list-style-type: none"> <li>Researches and prepares concise reports on local, state and federal policy as directed by the Legislative Liaison Director. Prepares background information necessary to educate the decision-making process of the Common Council and the Mayor's Office.</li> </ul>
15	<ul style="list-style-type: none"> <li>Supports the Legislative Liaison Director in the development of the state and federal legislative agendas. Assists the Legislative Liaison Director in communicating legislative updates to the Mayor, Common Council and city department heads. Works to have proposed legislation drafted per instructions from the Legislative Liaison Director, Mayor and Common Council (Judiciary and Legislation Committee) for introduction in the State Legislature and U.S. Congress in a timely manner. Proactively seeks introduction and passage of such legislation. Works to obtain amendments as necessary.</li> </ul>
15	<ul style="list-style-type: none"> <li>Conducts lobbying activity at various levels of government to advance the city's legislative agenda as directed by the Legislative Liaison Director. Prepares compelling testimony and speaks in support or opposition to</li> </ul>

% of Time	ESSENTIAL FUNCTION
	proposed legislation before committees of the governing bodies of various levels of government. Assists as directed in the effort to seek additional state and federal funds. Proactively develops and maintains positive relationships with elected and agency officials at various levels of government, as well as other lobbying entities and membership organizations. Coordinates meetings between these entities and the Mayor, Common Council and city departments,
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15	• Serves as a liaison between the Budget Office and Intergovernmental Relations Division within the Department of Administration. Under the direction of the Budget and Management Director identifies opportunities to improve the City's fiscal capacity through State or Federal Legislative change. Works with IRD to include and advance those initiatives through the Legislative process as appropriate.
10	• Prepares concise background documentation on policy and legislative issues as directed by the Legislative Liaison Director. Prepares supporting information for press releases, letters, resolutions and ordinances. Drafts letters on behalf of the Mayor, members of the Common Council and city department heads.
10	• Manages special projects and special initiatives of city-wide importance. Identifies and develops organizational changes that improve productivity, service quality or that diversify revenues. Provides general policy and advocacy support for the Mayor, Common Council and Department of Administration.
10	• Identify and track ongoing external revenues that come to the City from the State, Federal or other levels of government. Track the status of legislation that affects those funding sources and identify opportunities to secure or increase funding as appropriate through the legislative agenda. • Identify other external funding sources and coordinate with the City's Grant Manager as appropriate .

**B. PERIPHERAL DUTIES:**

% of Time	PERIPHERAL DUTY
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**C. NAME AND TITLE OF IMMEDIATE SUPERVISOR:**

Kimberly Montgomery, Legislative Liaison Director

**D. SUPERVISION RECEIVED:** (Describe the extent to which work assignments and methods are outlined, reviewed, and approved by this position's supervisor.)

General supervision by the Legislative Liaison Director. The ability to work independently and judgment is required on a daily basis.

**E. SUPERVISION EXERCISED:**

Total number of employees for whom responsible, either directly or indirectly = 0.

**Direct Supervision:** List the number and titles of personnel directly supervised. Specify the kind and extent of supervision exercised by indicating one or more of the following:

a. Assign duties	e. Sign or approve work
b. Outline methods	f. Make hiring recommendations
c. Direct work in progress	g. Prepare performance appraisals
d. Check or inspect completed work	h. Take disciplinary action or effectively recommend such
<b>Number Supervised</b>	<b>Extent of Supervision Exercised</b> (Select those that apply from list above, a - h)
	<b>Job Title</b>

a. Assign duties	e. Sign or approve work	
b. Outline methods	f. Make hiring recommendations	
c. Direct work in progress	g. Prepare performance appraisals	
d. Check or inspect completed work	h. Take disciplinary action or effectively recommend such	
Number Supervised	Job Title	Extent of Supervision Exercised (Select those that apply from list above, a - h)

**F. MINIMUM QUALIFICATIONS REQUIRED:** (Indicate the MINIMUM qualifications required to enter the job.)

i. Education and Experience:

Master's Degree in Political Science, Public Administration or related field preferred. College degree and knowledge of and experience with government at one or more levels may substitute for Master's Degree. Such knowledge and experience need not necessarily be obtained working directly for a government entity.

ii. Knowledge, Skills and Abilities:

Excellent research, analytical, oral and written communication skills. Ability to write concise and informative reports. Ability to make effective appearances and speeches before committees and public meetings. Ability to read and interpret legislation and other complicated documents. Personality characteristics which would enable him/her to meet and get along easily with others and to inspire trust and confidence in those they meet. Knowledge of governmental processes, governmental finance, legislative analysis and public policy issues facing municipalities. Ability to work proactively under pressure in a fast-paced, deadline-driven environment. Ability to work in a respectful and bipartisan manner with sound political judgement. Core competency factors include Attention to Communication, Persuasive Communication, Influencing Others, Diagnostic Information Gathering, Forward Thinking, Initiative, and Personal Credibility.

iii. Certifications, Licenses, Registrations:

Eligibility to obtain State of Wisconsin Lobbying license. Drivers license.

iv. Other Requirements:

**13. PHYSICAL AND ENVIRONMENTAL DEMANDS: TOOLS AND EQUIPMENT USED**

The Americans with Disabilities Act of 1993 requires job descriptions to provide detailed information regarding the physical demands required to perform the essential functions of a job; the conditions under which the job is performed; and the tools and equipment the employee will be required to use on the job. Reasonable accommodations may be made to enable qualified individuals to perform the essential duties and responsibilities of the job for each of the categories listed below.

**G. PHYSICAL ACTIVITY OF THE POSITION:** (List the physical activities that are representative of those that must be met to successfully perform the essential functions of the job).

**CHECK ALL THAT APPLY:**

<input type="checkbox"/>	<b>Climbing:</b> Ascending or descending ladders, stairs, scaffolding, ramps, poles, and the like; using feet and legs and/or hands and arms. Body agility is emphasized. Check only if the amount and kind of climbing required
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	exceeds that required for ordinary locomotion.
<input type="checkbox"/>	<b>Balancing:</b> Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. Check only if the amount and kind of balancing exceeds that needed for ordinary locomotion and maintenance of body equilibrium.
<input type="checkbox"/>	<b>Stooping:</b> Bending body downward and forward by bending spine at the waist. Check only if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.
<input type="checkbox"/>	<b>Kneeling:</b> Bending legs at knee to come to a rest on knee or knees.
<input type="checkbox"/>	<b>Crouching:</b> Bending the body downward and forward by bending leg and spine.
<input type="checkbox"/>	<b>Crawling:</b> Moving about on hands and knees or hands and feet.
<input type="checkbox"/>	<b>Reaching:</b> Extending Hand(s) and arm(s) in any direction.
<input checked="" type="checkbox"/>	<b>Standing:</b> Particularly for sustained periods of time.
<input checked="" type="checkbox"/>	<b>Walking:</b> Moving about on foot to accomplish tasks, particularly for long distances.
<input type="checkbox"/>	<b>Pushing:</b> Using upper extremities to exert force in order to draw, press against something with steady force in order to thrust forward, downward or outward.
<input type="checkbox"/>	<b>Pulling:</b> Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.
<input type="checkbox"/>	<b>Lifting:</b> Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. Check only if it occurs to a considerable degree and requires substantial use of the upper extremities and back muscles.
<input checked="" type="checkbox"/>	<b>Fingering:</b> Picking, pinching, typing or otherwise working primarily with fingers rather than with the whole hand or arm, as in handling.
<input type="checkbox"/>	<b>Grasping:</b> Applying pressure to an object with fingers and palm.
<input type="checkbox"/>	<b>Feeling:</b> Perceiving attributes of objects such as size, shape, temperature or texture by touching with the skin, particularly that of the fingertips.
<input checked="" type="checkbox"/>	<b>Talking:</b> Expressing or exchanging ideas by means of the spoken word. Those activities which demand detailed or important instructions spoken to other workers accurately, loudly or quickly.
<input type="checkbox"/>	<b>Hearing:</b> Perceiving the nature of sounds with no less than a 40 db loss. Ability to receive oral communication and make fine discriminations in sound.
<input type="checkbox"/>	<b>Repetitive Motions:</b> Substantial movements (motions) of the wrist, hands, and/or fingers.
<input checked="" type="checkbox"/>	<b>Driving:</b> Minimum standards required by State Law (including license).

**H. PHYSICAL REQUIREMENTS OF THE POSITION:** (List the physical requirements that are essential functions of the job.)

**CHECK ONE:**

<input checked="" type="checkbox"/>	<b>Sedentary Work:</b> Exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
<input type="checkbox"/>	<b>Light Work:</b> Exerting up to 10 pounds of force occasionally and/or negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for sedentary work and the worker sits most of the time, the job is rated for Light Work.
<input type="checkbox"/>	<b>Medium Work:</b> Exerting up to 50 pounds of force occasionally and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
<input type="checkbox"/>	<b>Heavy Work:</b> Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
<input type="checkbox"/>	<b>Very Heavy Work:</b> Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

**I. VISUAL ACUITY REQUIREMENTS:** (List the visual acuity requirements that are essential functions of the job.)

**CHECK ONE:**

<input checked="" type="checkbox"/>	<b>Operators (Electronic Equipment), Inspection, Close Assembly, Clerical, Administrative:</b> This is a minimum standard for use with those whose job requires work done at close visual range (i.e. preparing and analyzing data and figures, accounting, transcription, computer terminal, extensive reading, visual inspection involving small parts, operation of machines, using measurement devices, assembly or fabrication of parts).
<input type="checkbox"/>	<b>Machine Operators, Mechanics, Skilled Tradespeople:</b> This is a minimum standard for use with those whose work deals with machines where the seeing job is at or within arm's reach. This also includes mechanics and skilled tradespeople and those who do work of a non-repetitive nature such as carpenters, technicians, service people, plumbers, painters, mechanics, etc. (If the machine operator also inspects, check the "Operators" box.)
<input type="checkbox"/>	<b>Mobile Equipment Operators:</b> This is a minimum standard for use with those who operate cars, trucks, forklifts, cranes, and high lift equipment.

<input type="checkbox"/>	<b>Other:</b> This is a minimum standard based on the criteria of accuracy and neatness of work for janitors, sweepers, etc.
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**J. THE CONDITIONS THE WORKER WILL BE SUBJECT TO IN THIS POSITION:**

List the environmental/working conditions to which the employee may be exposed while performing the essential functions of the job. Include scheduling considerations such as on-call for emergencies, rotating shift, etc. **Approximate Percentage of time performing field work:** \_\_\_\_\_%

**CHECK ALL THAT APPLY:**

<input checked="" type="checkbox"/>	<b>None:</b> The worker is not substantially exposed to adverse environmental conditions (such as typical office or administrative work).
<input type="checkbox"/>	<b>The worker is subject to inside environmental conditions:</b> Protection from weather conditions but not necessarily from temperature changes (i.e. warehouses, covered loading docks, garages, etc.)
<input type="checkbox"/>	<b>The worker is subject to outside environmental conditions:</b> No effective protection from weather.
<input type="checkbox"/>	<b>The worker is subject to extreme cold:</b> Temperatures below 32 degrees for period of more than one hour.
<input type="checkbox"/>	<b>The worker is subject to extreme heat:</b> Temperatures above 100 degrees for periods of more than one hour.
<input type="checkbox"/>	<b>The worker is subject to noise:</b> There is sufficient noise to cause the worker to shout in order to be heard above the surrounding noise level.
<input type="checkbox"/>	<b>The worker is subject to vibration:</b> Exposure to oscillating movements of the extremities or whole body.
<input type="checkbox"/>	<b>The worker is subject to hazards:</b> Includes a variety of physical conditions, such as proximity to moving mechanical parts, electrical current, working on scaffolding and high places or exposure to chemicals.
<input type="checkbox"/>	<b>The worker is subject to atmospheric conditions:</b> One or more of the following conditions that affect the respiratory system or the skin: Fumes, odors, dust, mists, gases or poor ventilation.
<input type="checkbox"/>	<b>The worker is subject to oil:</b> There is air and/or skin exposure to oils and other cutting fluids.
<input type="checkbox"/>	<b>The worker is required to wear a respirator.</b>

**K. MACHINE, TOOLS, EQUIPMENT, ELECTRONIC DEVICES, SOFTWARE, ETC. USED BY POSITION:**

List equipment needed to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.)

**CHECK ALL THAT APPLY:**

<input type="checkbox"/> Camera and photographic equipment	<input checked="" type="checkbox"/> Office Equipment (desk, chair, telephone, etc.)
<input type="checkbox"/> Cleaning supplies	<input checked="" type="checkbox"/> Office supplies (pens, staplers, pencils, etc.)
<input type="checkbox"/> Commercial vehicle	<input type="checkbox"/> Packing materials (boxes, shrink wrap, etc.)
<input type="checkbox"/> Data processing equipment	<input checked="" type="checkbox"/> PC equipment (monitor, keyboard, printer, etc.)
<input type="checkbox"/> Handcart	<input checked="" type="checkbox"/> PC software
<input type="checkbox"/> Hand tools ( <i>please list</i> ):	
<input type="checkbox"/> Office Machines ( <i>check all that apply</i> ): <input checked="" type="checkbox"/> Copier <input checked="" type="checkbox"/> Facsimile <input checked="" type="checkbox"/> Calculator <input type="checkbox"/> Cash register	
<input type="checkbox"/> Other ( <i>please list</i> ):	

**L. SUPPLEMENTARY INFORMATION:** (Indicate any other information which further explains the importance, difficulty, or uniqueness of the position, such as its scope of responsibility related to finances, equipment, people, information, etc. Also indicate success factors such a personal characteristics that contribute to an individual's ability to perform well in the job, and any other special considerations.)

This position requires travel to Madison and other cities as directed, estimated to be 20% of total hours.

**M. I believe that the statements made above in describing this job are complete and accurate:**

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*Signature of Department Head or Designated Representative*