



**City of Milwaukee**  
Employees' Retirement System

**Bernard J. Allen**  
Executive Director

**David M. Silber, CFA, CAIA**  
Chief Investment Officer

**Melody Johnson**  
Deputy Director

February 18, 2025

The Honorable  
Civil Service Commission  
200 East Wells Street, Room 706  
Milwaukee, WI 53202

Dear Commissioners:

The Annuity & Pension Board, as administrator of the Employees' Retirement System (ERS) of the City of Milwaukee, is requesting renewal of exemption from City Service hiring and employment rules for the position of ERS Executive Director & Secretary.

This position is classified as 1WX and will become vacant after year-end due to the planned retirement of the long-serving current incumbent. This position is currently exempt.

The Board has a fiduciary responsibility to administer the pension provisions of Chapter 36 of the Milwaukee City Charter and oversees the ERS investment portfolio, of approximately \$6 Billion at present.

Because this position is integral to the Board's ability to discharge its fiduciary responsibilities to the approximately 30,000 ERS members and beneficiaries, an exempt position would give the ERS flexibility in recruiting for this key position and promote greater accountability by the successful candidate. Thank you for your consideration.

Sincerely yours,

**Bernard J Allen**  
Executive Director & Secretary



Department of Employee Relations

**Cavalier Johnson**  
Mayor

**Harper Donahue, IV**  
Director

**Molly King**  
Employee Benefits Director

**Nicholas DeSiato**  
Labor Negotiator

**TO:** The Honorable  
The Board of City Civil Service Commissioners

**FROM:** Kristin Hennessy Urban  
Human Resources Manager

**DATE:** February 20, 2025

**RE:** Request from the Annuity and Pension Board to **re-exempt** the position of Employees' Retirement System - Executive Director

<u>Position Title</u>	<u># of Positions</u>	<u>Pay Range</u>
Employees' Retirement System - Executive Director	1	1WX (\$188,256-\$263,549)

On behalf of the Annuity and Pension Board, please find attached a request from current Employees' Retirement System - Executive Director Bernard Allen to **re-exempt** the position of Employees' Retirement System - Executive Director and a job description.

The Employees' Retirement System—Executive Director reports directly to the Annuity and Pension Board, administering the system's daily operations and directing the Employees' Retirement System (ERS) staff. This highly sensitive position requires accountability to the Board and the ability to represent the Board in public forums. Additionally, the incumbent will advise the Board on business and policy matters. Accordingly, I recommend approval of the request to re-exempt this high-profile and critical position.

Please contact me at 414.286.8643 if you have additional questions about this request.

# JOB DESCRIPTION

## FOR DER USE ONLY

### Vacancy No.

City Service  
Commission:  
Fire & Police  
Commission:

Finance  
Committee:  
Common  
Council:

**Instructions:** Complete all sections. Refer to the *Guidelines for Preparing Job Descriptions* for instructions on completing specific items.

<b>1. Date Prepared/ Revised:</b> 03/30/2022		<b>2. Present Incumbent:</b> Bernard J. Allen		<b>Is incumbent underfilling position?</b>	
<b>3. Date Filled:</b> 02/18/2008		<b>4. Previous Incumbent:</b> Michael Dolsen		YES <input type="checkbox"/> NO <input checked="" type="checkbox"/> If YES, indicate Underfill Title in box 10.	
<b>5. Department:</b> Employees' Retirement System		<b>Bureau:</b> <b>Division:</b> Administration		<b>Unit:</b> <b>Section:</b>	
<b>6. Work Location:</b> 789 N Water St, Ste 300 Milwaukee, WI 53202		<b>Telephone:</b> 414-286-5454 <b>Email:</b> jerry.allen@cmers.com		<b>Work Schedule:</b> Hours: 8am – 4:45pm / Days: M-F	
<b>7. Represented by a Union?</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		<b>8. Bargaining Unit:</b> Non-Mgmt/Non-Rep If in District Council 48, which local?		<b>9. FLSA Status (check one):</b> <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt	
<b>10. Official Title:</b> ERS Executive Director & Secretary				<b>Pay Range</b>	<b>Job Code</b>
<b>Underfill Title (if applicable):</b>				1WX	
<b>Requested Title (if applicable):</b>					
<b>Recommended Title (DER Use Only):</b>				<b>Approved by:</b>  <b>Date:</b>	

## 11. BASIC FUNCTION OF POSITION:

This position serves as the Department Head of the Employees' Retirement System and the Secretary and Executive Director of the Annuity and Pension Board. Responsibilities include planning, organizing, directing and managing a professional staff of 50 individuals involved in servicing members and beneficiaries of the System, and all functions necessary to assist the Annuity and Pension Board in carrying out its fiduciary responsibilities in making effective the provisions of Chapter 36 of the Employees' Retirement System Law.

## 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
25%	• Responsible for administering the daily operation of the Employees' Retirement System (ERS). Interprets and implements the proper application of ERS Law (Chapter 36) including all rules, charter ordinances and legal opinions that apply thereto
25%	• Monitors the activities of the Deputy Director, Chief Investment Officer, Chief Financial Officer, Chief Technology Officer, ERS Operations Director, Member Services Manager and ERS Business Operations Analyst relative to all agency activities of the ERS.
10%	• Develop, justify and manage the department budget.
3%	• Directs the planning of work and setting schedules to ensure that the department's goals are achieved.
1%	• Support and implement the Affirmative Action and equal employment policies of the City.
1%	• Administers the Group Life Insurance program and Retiree Medical Benefits program for the City of Milwaukee.
10%	• Manage the staff of the ERS. Establish goals, monitor and evaluate management employee performance. Provide a comprehensive, on-going training program for all staff. Provide a work atmosphere that encourages teamwork and productivity innovation.
5%	• Annually monitor the preparation of the Annual Comprehensive Financial Report showing the fiscal transactions of the retirement system for the preceding year, the amount of the assets of the system, and the financial condition of the system as disclosed by actuarial valuation of the system, for distribution to the member and beneficiaries.

The above statements are intended to summarize the nature and level of work and typical responsibilities and duties being performed by the incumbent(s) of this job. They are not intended to be an exhaustive list of all responsibilities, duties, and tasks required of the position.

% of Time	ESSENTIAL FUNCTION
1%	<ul style="list-style-type: none"> <li>Annually monitor the preparation and procedures for the processing of year-end work in order to initiate the distribution of the annual statements to the members of the system.</li> </ul>
1%	<ul style="list-style-type: none"> <li>Direct the preparation of the records of data to serve as the basis for the actuarial report, and interpret information received from the actuary.</li> </ul>
1%	<ul style="list-style-type: none"> <li>Supervise and develop the process and procedures used in the calculation of benefits.</li> </ul>
1%	<ul style="list-style-type: none"> <li>Administer the accounting system including accounting, benefit payment and contributions.</li> </ul>
1%	<ul style="list-style-type: none"> <li>Reviews the results of the finding of the Medical Panels and Council for consistent application of the Act.</li> </ul>
1%	<ul style="list-style-type: none"> <li>Approves payment of claims for death and disability benefits</li> </ul>
1%	<ul style="list-style-type: none"> <li>Oversees the retiree pension payroll to ensure that monthly benefits are processed timely.</li> </ul>
10%	<ul style="list-style-type: none"> <li>Serves as Secretary to the Annuity and Pension Board. Provides direction and support services to the eight member board. Prepares agendas for meetings. Attends the meetings and maintains a permanent record of the same. Investigates the operation and effect of the retirement system's rules and procedures and reports any findings or recommended changes to the Board.</li> </ul>
1%	<ul style="list-style-type: none"> <li>Prepares reports as requested by the Board.</li> </ul>
1%	<ul style="list-style-type: none"> <li>Must keep abreast on the activities and performance of the Fund's investment managers and consultants.</li> </ul>
1%	<ul style="list-style-type: none"> <li>Recommends and prepares legislative changes which may become necessary due to a change in Board policy, change in legal environment or any other such circumstances. Also represents the Board before various legislative committees as needed, and keeps the Board informed of any legislative matters or current developments the Board may be affected by.</li> </ul>

**B. PERIPHERAL DUTIES:**

% of Time	PERIPHERAL DUTY
	<ul style="list-style-type: none"> <li>Other duties as assigned by the Annuity and Pension Board.</li> </ul>
	<ul style="list-style-type: none"> <li></li> </ul>

**C. NAME AND TITLE OF IMMEDIATE SUPERVISOR:**

Annuity and Pension Board.

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

This position is a department head and reports to the Annuity and Pension Board

**E. SUPERVISION EXERCISED:**

Total number of employees for whom responsible, either directly or indirectly = 50.

**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:

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	
Number Supervised	Job Title	Extent of Supervision Exercised (Select those that apply from list above, a - h)
1	Deputy Director	A - H
1	Chief Investment Officer	A - H
1	ERS Chief Financial Officer	A – H
1	ERS Chief Technology Officer	A – H
1	Disability Deputy Director	A – H
1	ERS Operations Director	A - H
1	Retirement Plan Manager	A – H
1	ERS Business Operations Analyst	A - H
1	Administrative Assistant IV	A – H

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

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- i. Education and Experience:  
Bachelor's degree from an accredited college or university, with a major in Accounting or Finance. Advanced degree in business helpful, but not required. Five years as a plan administrator or assistant of public or private plan of comparable size, or equivalent, as determined by the Annuity and Pension Board.
- ii. Knowledge, Skills and Abilities:  
is one involving the exercise of a high degree of judgment. It requires extensive knowledge of principles, purposes, techniques and trends of private or governmental retirement systems; including principles and practices of portfolio management; ability for interpretation and understanding of actuarial studies and reports; knowledge of accounting and administrative procedures; and the ability to provide support and direction for the entire department. Is responsible for the safeguarding of the assets of the system for a \$6.1 billion dollar fund, including oversight of the fund managers and consultants
- iii. Certifications, Licenses, Registrations:
- iv. Other Requirements:

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

The Americans with Disabilities Act (ADA) of 1990, as amended by the Americans with Disabilities Act Amendments Act (ADAAA) of 2008 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 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 checked="" 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.

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<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 checked="" 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 checked="" 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.

**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 ( <i>such as typical office or administrative work</i> ).
<input type="checkbox"/>	<b>The worker is subject to inside environmental conditions:</b> Protection from weather conditions but not necessarily from temperature changes ( <i>i.e. warehouses, covered loading docks, garages, etc.</i> )
<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.

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☐ The worker is required to wear a respirator.

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

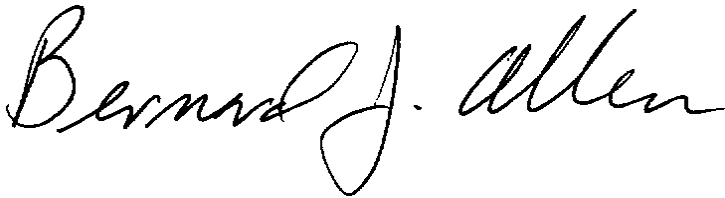
List equipment needed to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.)

**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 checked="" 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 <b>(please list):</b>	
<input type="checkbox"/> Office Machines <b>(check all that apply):</b> <input checked="" type="checkbox"/> Copier <input checked="" type="checkbox"/> Facsimile <input checked="" type="checkbox"/> Calculator <input type="checkbox"/> Cash register	
<input type="checkbox"/> Other <b>(please list):</b>	

**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.)

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



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