



Department of Employee Relations

Tom Barrett
Mayor

Maria Monteagudo
Director

David Heard
Fire and Police Commission
Executive Director

Michael Brady
Employee Benefits Director

David Kwiatkowski
Labor Negotiator

June 24, 2005

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

Dear Committee Members: Re: Common Council File Number 050230

The following classification and pay recommendations will be submitted to the City Service Commission for consideration on June 28, 2005. We recommend these classification and pay levels, subject to approval by the City Service Commission:

In the Department of Administration, Budget and Management Division, one position of Budget and Management Analyst-Lead, Salary Grade 006, held by Patrick Hartmann, is recommended for reclassification to Budget and Management Special Assistant, Salary Grade 008.

In the Department of Public Works-Water Works, one vacant position of Claims Adjuster Specialist, Salary Grade 005, is recommended for a title change to Water Claims Specialist, Salary Grade 005.

Job evaluation reports covering the above positions, including the necessary Salary and Positions Ordinance amendments, are attached.

Sincerely,

Maria Monteagudo
Employee Relations Director

MM:pb

Attachments: 2 Job Evaluation Reports
 Fiscal Note

c: Sharon Robinson, Mark Nicolini, Erick Pearson, Patrick Hartmann, Marianne Walsh,
Jeffrey Mantes, Dan Thomas, Carrie Lewis and Laura Daniels

JOB EVALUATION REPORT

City Service Commission Meeting Date: June 28, 2005

Incumbent: Patrick Hartmann Department: Department of Administration - Budget and Management Division

Present	Request
Title: Budget and Management Analyst-Lead	Title: Budget and Management Special Assistant
Salary: Salary Grade 006 (\$47,264 - \$66,176)	Salary: Salary Grade 008 (\$53,686 - \$75,158)
Step: Step 5 (\$53,414)	Source: Department
Recommendation: Title: Budget and Management Special Assistant Salary: Salary Grade 008 (\$53,686 - \$75,158) Step 2 (\$55,354)	
Rationale: This position has been delegated more complex budget management and analysis duties including responsibility for the Department of Public Works (DPW) – Operations Division budget. The position coordinates the analysis and development of approximately 50 special purpose accounts; and reviews, analyzes and implements changes to the overall budget process consistent with the responsibility level associated with other positions classified as Budget & Management Special Assistant.	
History of Positions: A position in this classification was last studied in 1992 when one position of Budget and Management Analyst – Senior in Salary Grade 005 was reclassified to Budget and Management Analyst-Lead in Salary Grade 006.	

Action Required

In the Position's Ordinance, Department of Administration, Budget and Management Division, Budget and Management Section, delete one position of Budget and Management Analyst-Lead and add one position of Budget and Management Special Assistant

Background:

The Department of Employee Relations (DER) received a letter, dated September 21, 2004, from the Department of Administration, Budget and Management Division, requesting a classification study of two positions of Budget and Management Analyst- Lead. A job analysis questionnaire was received from each of the incumbents plus a standard job description. In March of this year one of the incumbents was promoted to a vacant position of Fiscal Planning Specialist in Salary Grade 008 and the department decided to change their request for reclassification to just one position. Discussions were held with the incumbent, Patrick Hartmann; Mark Nicolini, Budget and Management Director; and the position's immediate supervisor, Eric Pearson, Budget and Policy Manager.

Duties and Responsibilities:

The basic function of this position is to analyze, develop and administer city budgets and policies to maximize the value and efficiency of city services. The duties and responsibilities are as follows:

- 60% Budget Preparation
 - Analyze department budget requests and policies included in the Mayor's proposed budget.
 - Prepare portions of the Mayor's proposed budget, amendments to the budget and the adopted City budget.
 - Report on policies included in the Mayor's proposed budget to legislative committees.
- 20% Policy and Management Analysis
 - Study City policies and operations to improve service delivery effectiveness and efficiency.
 - Collect and analyze data.
 - Work with City managers to identify improvements to service delivery and efficiency.
- 20% Budget Administration
 - Monitor adherence to approved budget funding levels throughout budget year and to policy and operations as dictated by the annual budget and other legislation.
 - Work with departments to ensure implementation of policy and operations as dictated by annual budget and other legislation.

According to the job description submitted by the department this position requires a Bachelor's Degree in Political Science, Policy Analysis, Public Administration, or related area plus two years of experience as a Budget Analyst or equivalent position with significant experience in public policy analysis or public administration. A Master's Degree in one of the areas listed above is preferable. Equivalent combinations of education and experience may also be considered. Other requirements include budget and policy analysis skills; an ability to present and defend recommendations to the Mayor, Common Council and policy making committees; effective written and oral communication skills; knowledge and proficiency of computer software including spreadsheets and word processing; an ability to set priorities and use sound judgment when working on confidential and highly sensitive issues; and strong organizational skills.

Changes in the Position:

This position is now responsible for the DPW-Operations budget which is a key budget for policy and program changes with significant fiscal and service delivery impact in the community. This budget includes complex operational and administrative issues such as garbage collection and snow and ice control operations. Some of the most critical challenges facing the Division's budget in 2005 are the City Hall Restoration Project, Traser Yard Relocation Project, Fleet Maintenance and Management Program, and the Solid Waste Fee Structure. This assignment has increased the number and variety of policy, budget and operational areas in which the position is involved. Other changes include responsibility for centrally coordinating analysis and development of special purpose accounts; and playing a key role in reviewing, analyzing and implementing changes to the overall budget process including revised forms and documents.

Analysis:

This position is functioning at a level consistent with other Budget and Management Special Assistants in the Budget and Management Division. The level of complexity associated with the position's current assignment warrants equating it to the requested level. A comparison made between the position under study and the Special Assistant level reveals that Special Assistants do the following:

- assume primary responsibility for a significant policy area in the City budget
- interact more independently with policy makers and elected officials
- take a lead role in processes related to production of the overall city budget such as budget summaries, amendments, format and automation

June 28, 2005

The position under study now has responsibility for the budget of one of the largest departments in the City (DPW – Operations) and has also taken on responsibility for coordinating analysis and development of the approximately 50 special purpose accounts, and reviewing, analyzing and implementing changes to the overall budget process. Examples of the special purpose accounts include the \$19.3 million Wage and Supplement Fund, the \$50 million Reimbursable Services Advance Fund, and the \$33.4 million Milwaukee Metropolitan Sewerage District (MMSD) Sewer Users Charge Fund.

The department indicated that the number of budget analyst staff has decreased by 40% since 1994. Consequently, more responsibility has been given to all positions. The changes in duties and responsibilities of the position under study have strengthened it so that it is comparable to other Salary Grade 008 level positions in the department, specifically the requested classification of Budget and Management Special Assistant.

Based on our review the management job evaluation factors should be as follows:

<u>Factor</u>	<u>Level</u>	<u>Points</u>
Impact and Accountability	8	120
Knowledge and Skills	6	80
Relationships Responsibility	9	67
Working Conditions	1	<u>5</u>
		272

Salary Grade 008 (266-305)

Recommendation

Based on the above analysis we recommend this position of Budget and Management Analyst – Lead in Salary Grade 006 be reclassified to Budget and Management Special Assistant in Salary Grade 008.

Prepared by: Andrea Knickerbocker
Andrea Knickerbocker, Human Resources Manager

Prepared by: Sarah Trotter
Sarah Trotter, Human Resources Representative

Reviewed by: Maria Monteagudo
Maria Monteagudo, Employee Relations Director

JOB EVALUATION REPORT

City Service Commission Meeting Date: June 28, 2005

Incumbent: Vacant

Department: Department of Public Works – Water Works

Present	Request
Title: Claims Adjuster Specialist	Title: Water Claims Specialist
Salary: Salary Grade 005 (\$44,349 - \$62,092)	Salary: Same
Step: Not Applicable	Source: Department
Recommendation: Title: Water Claims Specialist Salary: Salary Grade 005 (\$44,349 - \$62,092)	
Rationale: The knowledge base and experience requirements for this position are quite different from the other City position with this title in Employee Benefits. This new title will distinguish the position under study from the other position and will better reflect the work that is being performed and the types of claims that are being handled.	
History of Positions: This position was last studied in 1995 when it was reclassified from Property and Damage Coordinator in Salary Grade 003 to Claims Adjuster Specialist in Salary Grade 005.	

Action Required

In the Salary Ordinance, under Salary Grade 005, add the title of "Water Claims Specialist".

In the Positions Ordinance, under Department of Public Works – Water Works, Business Organization, Accounting Services Section, delete one position of Claims Adjuster Specialist and add one position of Water Claims Specialist.

Background:

The Department of Employee Relations (DER) received a letter, dated June 14, 2005, from the Department of Public Works – Milwaukee Water Works (MWW) requesting a new title for their vacant position of Claims Adjuster Specialist in Salary Grade 005. A new job description was submitted and discussions were held with Laura Daniels, Administration and Projects Manager.

Duties and Responsibilities:

The basic function of this position is to manage claims levied by and against the MWW by conducting thorough investigations, gathering all relevant documentation, and coordinating the department's response; respond on behalf of the department to the City Clerk's Office, the City Attorney's Office, and the Department of Public Works; and represent MWW at the Judicial and Legislative Committee of the Common Council. The duties and responsibilities are as follows:

- 30% Conduct investigation of claims levied against MWW by researching necessary documents such as work orders, daily operations logs, request slips, the Customer Information System and Diggers Hotline information; and interviewing involved parties at various MWW facilities. Maintain detailed records and information for each claim and damage; respond to deadlines in a timely manner and without exception, follow up on each claim until resolved, assist claimants with mitigating damages and possible resolutions, and negotiate settlements for approval when appropriate.

- 25% Conduct investigations of damages to the MWW. Document evidence with digital camera/video, measurements, drawings, and detailed descriptions; collect necessary documentation related to the loss; evaluate and prepare reports and correspondence; and follow up to resolve the matter in the best interests of the City of Milwaukee and MWW.
- 15% Assist City Attorneys in the preparation of a legal defense for those cases involving litigation. Assist in gathering evidence; attend depositions, trials, and committee meetings; provide testimony when requested; coordinate the participation of other City departments in the investigation and/or defense of interdepartmental claims; and represent the MWW at the Common Council Judicial and Legislative Committee regarding claims.
- 10% Coordinate with Accounting Services for appropriate billing and follow up to ensure payment is received. Pursue timely collection of damages to MWW including negotiating settlements as approved to do so.
- 10% Assist customers seeking financing for owner's leaks by advising them of possible alternatives. Facilitate repairs and the processing of bills for payment; coordinate with Water Distribution and Plumbing Inspection for required action regarding inhabited properties without water service; prepare and follow through on all tax roll documentation; and be a liaison with property owners regarding MWW Rules and Regulations on owner's leaks.
- 5% Develop and maintain database for documentation and analysis of claim activity; develop and assist with implementation of activities to limit MWW claim activity; and provide incident follow up and loss prevention training with MWW management and employees to help reduce future losses.
- 5% Other duties as assigned.

According to the job description submitted by the department this position requires a Bachelor's Degree in Business Administration or related area with course work in Statistics, Accounting, and Business Law or five years of direct experience in Water Distribution, Construction, or Commercial Claims Adjusting. Equivalent combinations of education and experience may also be considered. Other requirements include computer experience and competence in word processing and spreadsheet applications and an ability to conduct field investigations by reporting to the site, operating a digital camera and video equipment, and providing measurements, drawings and detailed descriptions; develop detailed reports and business correspondence; prioritize multiple assignments and meet deadlines; respond to emergency requests and investigations in a Construction setting; interact with the public, city employees, and people in private industry; and represent the MWW with a high degree of tact and diplomacy to deal with persons in a wide variety of positions.

Analysis:

The department indicated that they feel the current title is not an accurate description of the position's duties since there is not an emphasis on adjusting claims. Further, the title is also used in the Employee Benefits Division of the Department of Employee Relations where the basic function of the job is quite different from the position in their department. The basic function of the position in Employee Benefits is to specialize in advanced worker's compensation claims adjusting that includes difficult and complex issues that can not be resolved at other adjusting levels; litigation including independently negotiated settlements; and presentations at pre-hearings and hearings. The position also serves as a backup to the Section Supervisor. The requirements for the position are a Bachelor's Degree in Business, Insurance, or related field or a minimum of three years of advanced worker's compensation adjusting at the senior level which include presentations at hearings and prehearings. Equivalent combinations of education and experience may also be

June 28, 2005

considered. Other requirements include knowledge of the Worker's Compensation Law and the ability to apply it; strong persuasive communication skills; ability to work independently and make well reasoned thought out decisions; critical thinking skills and the ability to multi-task.

There are some similarities between these two positions but the knowledge base and experience requirements are quite different. One needs an extensive knowledge of worker's compensation law and the other needs to be knowledgeable of Statistics, Accounting, Business Law, Water Distribution, Construction and/or Commercial Claims Adjusting. The current title is appropriate for the position in Employee Benefits since it does focus on adjusting claims while the position under study does not. The differences between these positions suggest that a different title for the position under study would be appropriate. The requested title of Water Claims Specialist is good since it is descriptive of the work that this position is performing and the types of claims that are handled. It also will distinguish this position from the Claims Adjuster Specialist position in Employee Benefits.

Recommendation

Based on the above analysis we recommend the title of this position be changed from Claims Adjuster Specialist to Water Claims Specialist.

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

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