



Department of Employee Relations

John O. Norquist
Mayor

Florence Dukes
Director

David Heard
Fire and Police Commission
Executive Director

Frank Forbes
Labor Negotiator

Michael Brady
Employee Benefits Director

December 3, 2003

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

Dear Committee Members: Re: Common Council File Number 030915

The following classifications and pay levels were approved by the City Service Commission on December 2, 2003:

In the Election Commission, one position of Office Assistant IV, Pay Range 445, held by Denise Walton, was reclassified to Administrative Assistant III, Pay Range 530

Classification changes were approved for four positions in the Department of Administration's Budget and Policy Division as part of a reorganization for 2004; and title changes were approved for two positions in the Library.

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

Sincerely,

Florence H. Dukes
Employee Relations Director

FHD:pb

Attachments: 2 Job Evaluation Reports
 Fiscal Note

c: Sally McAttee, Marianne Walsh, Joseph Czarnetzki, Jennifer Gonda, Sandra Rotar, John Ledvina, Kathleen Huston, Judith Zemke, Paula Kiely, Sandra Lockett, Julietta Henry, Victoria Robertson, Denise Walton, Richard Abelson, Paula Dorsey, John English and John Garland.

JOB EVALUATION REPORT

City Service Commission Meeting Date: December 2, 2003

Incumbent: Denise Walton

Department: Election Commission

Present	Request
Title: Office Assistant IV	Title: Administrative Assistant IV
Salary: Pay Range 445 (\$30,890 - \$34,183)	Salary: Pay Range 550 (\$39,014 - \$44,640)
Current Rate: \$34,183	Source: Department
<p>Recommendation: Title: Administrative Assistant III Salary: Pay Range 530 (\$34,735 - \$39,322) New Rate: \$34,735</p>	
<p>Rationale: This recommendation is based on the new duties and responsibilities that this position has taken on such as processing inquiries of a more complex nature regarding candidate and campaign financial compliance and election issues; processing desk audits of financial records for candidates and political action committees; providing more administrative support to management; and serving as the lead worker in the office for three positions, two of which are currently at a higher level. The level of these new duties and responsibilities are most consistent with the position description for Administrative Assistant III.</p>	
<p>History of Position: This position was last studied in 2000 when the department requested a reclassification to Administrative Specialist in Salary Grade 2. No change was recommended at that time.</p>	

Action Required:

In the Positions Ordinance, under Election Commission, General Office, delete one position of Office Assistant IV and add one position of Administrative Assistant III.

Background:

The Department of Employee Relations received a letter dated August 20, 2003 from Julietta Henry, Election Commission – Executive Director, requesting a classification study of an Office Assistant IV position located in her department. The incumbent completed a job analysis questionnaire and discussions were held with the incumbent, the position’s supervisor, Julietta Henry, Election Commission-Executive Director, and Victoria Robertson, Election Services Manager.

Duties and Responsibilities:

The basic function of this position, according to the revised job description dated August 20, 2003, is to be responsible for providing administrative support to the Executive Director-Election Commission and Election Services Manager in all of the functions of the Department and serving as the lead position for the regular and temporary staff. The duties and responsibilities are as follows:

- 30% **Office Management** which includes assigning duties, directing work activities, and training for regular and temporary staff; developing and monitoring staff work schedules; reviewing and processing all payables and receivables; processing payroll and benefits; approving all correspondence prepared for signature by management and maintaining all general office files.
- 30% **Election Support** which includes advising candidates concerning their election related responsibilities; preparing, distributing and publishing the Board of Election Commissioners meeting agendas and minutes; serve as primary contact with other City departments for coordination of election-related services; and responsibility for generating post-election reports.
- 15% **Administrative Assistant Duties** which includes composing confidential memos, reports and correspondence; maintain the Executive Director's calendar, travel, record keeping and mileage reports; and search records and database for data needed by management for presentations and reports.
- 10% **Procurement and Contract Administration** which includes auditing vendor invoices prior to payment; maintaining department inventory; and researching, compiling, and analyzing procurement and service contract data.
- 10% **Campaign Finance Report Processing** which includes processing desk audits of financial records for candidates and political action committees; and preparing reports for the Board of Election Commissioners and District Attorney's Office when a candidate is not in compliance with Wisconsin State Statutes.
- 5% **Budget Development/Monitoring** which includes developing and maintaining computer records of department funds and expenditures.

This position requires an Associate Degree in Accounting, Business Administration, or a related field and four years of related experience. Equivalent combination of education and experience may be considered. The position also requires a knowledge of and a high degree of skill in Election processing; high degree of written and verbal communication skills; strong customer service orientation with a high degree of interpersonal skills; and an ability to work independently; prioritize; produce accurate work under deadlines; use good judgment and discretion in handling work assignments; effectively plan, coordinate, and direct the work of others; follow verbal and written instruction from supervisors; identify a challenge, analyze options and identify a resolution to an issue; use proficiently various personal computer applications including database applications; exercise tact and restraint in dealing with irate people; and work in a high pressure environment. Further, the position also requires excellent supervisory skills and unquestioned integrity due to the confidential nature of the work performed.

Changes in the Position:

According to the job analysis questionnaire this position is performing a number of duties previously performed by the Election Service Manager. These duties include processing inquiries of a more complex nature regarding candidate and campaign financial compliance and election issues; preparing public and confidential reports for the Board of Commissioners and District Attorney's Office related to Campaign Finance Report processing; processing desk audits of financial records for candidates and political action committees; reviewing and approving all correspondence prepared by staff for the signature of the Executive Director and Election Services Manager; and researching, analyzing and correcting vendor discrepancies. This position also now is responsible for analyzing cash receipts and monitoring various reports to support processing of the related open record requests and revenue receipts account and is the administrator for forms, nomination papers, post election statistical reports, campaign finance reports and other election related data.

The Department indicated that this position has evolved so that it is the number three position in the department after the two top management positions. This position is the lead worker in the office and can handle basic inquiries from the media.

Analysis:

The changes listed above have strengthened this position. Many of the changes can be considered administrative support to management. The requested Administrative Assistant ("Secretary") Job Series is described and compared to other job series below:

The Administrative Assistant series includes all office support positions performing secretarial duties directly supporting the work of one or more managers or high-level professionals. The managers to whom these Administrative Assistants report are usually in middle management, and often in top management. Positions performing the general office work not directly supporting the work of a manager, as a personal secretary, are included in the Office Assistant series. Higher level office support positions having their own distinct area of responsibility, apart from that associated with a manager, are included in the Program Assistant series. Positions reporting directly to an elected official are included in the Executive Administrative Assistant series. The different levels in the Administrative Assistant series are as follows:

Administrative Assistants I typically report to one or two managers or one or two professionals

Administrative Assistants II typically report to one high level manager, such as a division or section head

Administrative Assistants III typically provide administrative and secretarial services to a formal board or commission and the head of a major organizational function such as library services or human resources.


Administrative Assistants IV provide administrative and secretarial services to the director of an extremely complex and multifaceted department such as the Police Department or the Department of City Development.

Based on the descriptions above the position under study best fits the definition of an Administrative Assistant III since the position does provide administrative and secretarial services to the Election Commission and to the Department Head. The position also serves as a lead worker for three positions in the office, two Program Assistants I and one Customer Service Representative II, as well as 12 to 30 temporary office workers who work for several weeks surrounding each election. The Administrative Assistant III level will also place this position at a higher level than the two Program Assistant I positions in the Department. Although the Election Commission is a smaller department, it does have responsibility for a major organizational function within the City. It is not, however, a complex and multifaceted department such as the Police Department and therefore this position does not fit the definition of the Administrative Assistant IV classification.

Recommendation:

Based on the above analysis, we recommend this position of Office Assistant IV in the Election Commission be reclassified to Administrative Assistant III in Pay Range 530.

Prepared By: 
Sarah Trotter, Human Resources Representative

Reviewed By: 
Florence Dukes, Employee Relations Director

November 25, 2003

JOB EVALUATION REPORT

City Service Commission Meeting Date: December 2, 2003

This report recommends appropriate classification changes for four positions in the Department of Administration and two positions in the Milwaukee Public Library. The following chart summarizes the recommended changes.

Department of Administration

Current	Requested	Recommended
Capital Planning and Finance Specialist SG 009 (\$53,158-74,419)	Budget and Management Special Assistant SG 008 (\$49,853-69,792)	Budget and Management Special Assistant SG 008 (\$49,853-69,792)
Program Evaluation Specialist SG 010 (\$56,651-79,313)	Fiscal Planning Specialist-Senior SG 010 (\$56,651-79,313)	Fiscal Planning Specialist-Senior SG 010 (\$56,651-79,313)
Budget and Management Team Leader SG 011 (\$60,397-84,553)	Budget and Policy Manager SG 011 (\$60,397-84,553)	Budget and Policy Manager SG 011 (\$60,397-84,553)
Budget and Management Team Leader SG 011 (\$60,397-84,553)	Budget and Policy Manager-Senior SG 012 (\$64,363-90,107)	Budget and Policy Manager-Senior SG 012 (\$64,363-90,107)

Library

Current	Requested	Recommended
Deputy City Librarian SG 015 (\$77,943-109,118)	Manager of Central Library Services SG 015 (\$77,943-109,118)	Manager of Central Library Services SG 015 (\$77,943-109,118)
Assistant City Librarian SG 013 (\$68,596-96,041)	Manager of Neighborhood and Extension Services SG 013(\$68,596-96,041)	Manager of Neighborhood and Extension Services SG 013 (\$68,596-96,041)

Action Required (effective Pay Period 1, 2004 – December 21, 2003):

In the 2004 Salary Ordinance, under Salary Grade 009 delete the title "Capital Planning and Finance Specialist." Under Salary Grade 010, delete the title "Program Evaluation Specialist" and add the title "Fiscal Planning Specialist-Senior." Under Salary Grade 011, delete the title of "Budget and Management Team Leader" and add the title "Budget and Policy Manager." Under Salary Grade 012, add the title "Budget and Policy Manager-Senior." Under Salary Grade 013, delete the title "Assistant City Librarian" and add the title "Manager of Neighborhood and Extension Services." Under Salary Grade 015, delete the title "Deputy City Librarian" and add the title "Manager of Central Library Services."

In the 2004 Positions Ordinance, under Library, Neighborhood Library and Extension Services Decision Unit, Extension Services Bureau, Neighborhood Services Division, delete one position of Assistant City Librarian (X) (Y) and add one position of Manager of Neighborhood and Extension Services (X) (Y). Under Central Library Decision Unit, Central Library Services Bureau, delete one position of Deputy City librarian (X) (Y) and add one position of Manager of Central Library Services (X) (Y).

DEPARTMENT OF ADMINISTRATION

The requested changes described below are part of a reorganization within the Department of Administration that was approved in the 2004 budget. This reorganization includes incorporating the former Intergovernmental Relations Division into the Budget and Policy Division (currently Budget and Management Division), and eliminating the Legislative Liaison Director position.

Current:	Capital Planning and Finance Specialist	SG 009
Requested:	Budget and Management Special Assistant	SG 008
Recommended:	Budget and Management Special Assistant	SG 008

The basic function of this position is to analyze and make recommendations on several major departmental budgets, complex public policy, fiscal and/or management studies, and budget administration issues. As the principal analyst on complex studies, this position provides direction, guidance and training to lower level analysts.

The position requires a related Bachelor's degree (Masters preferred) and at least two years of budget analyst experience with emphasis in public policy analysis or public administration. In addition, the position requires significant skills in the following areas: budget and policy analysis, written and oral communication, computer software packages, and management skills.

The Capital Planning and Finance Specialist position, Salary Grade 009, is currently being underfilled as a Budget and Management Special Assistant in Salary Grade 008. The department would like to make that change official as this position's responsibilities are comparable in scope and level to the other two Budget and Management Special Assistant positions. This change would enhance the department's flexibility in rotating assignments among the three positions as needed. We agree with this requested change and recommend that this position be reclassified to Budget and Management Special Assistant in SG 008.

Current:	Program Evaluation Specialist	SG 010
Requested:	Fiscal Planning Specialist - Senior	SG 010
Recommended:	Fiscal Planning Specialist - Senior	SG 010

This position has primary responsibility for fiscal planning which will continue in the new Budget and Policy Division. Specific functions include:

- Propose and analyze policy direction for the city's financial operations and fiscal strategies, including capital, debt, pensions and revenues.
- Provide detailed evaluation and analysis, propose policy initiatives, and furnish reports on the status and fiscal needs of city operations.
- Assist the City Economist and Fiscal Planning Specialist, and other analysts as assigned, to complete these functions.

The requirements for this position include a related Master's degree and significant experience in economic and statistical analysis. Three years of budget analyst or similar experience, and experience analyzing legislation are preferred qualifications. In addition, the position requires significant skills in the following areas: policy and economic analysis, written and oral communication, computer software packages, and management skills.

The requested title more accurately portrays the duties of the position as it has been functioning. We therefore support the requested title change to Fiscal Planning Specialist - Senior. As the duties of the position are not significantly changing, the position will remain in Salary Grade 10.

Current:	Budget and Management Team Leader	SG 011
Requested:	Budget and Policy Manager	SG 011
Recommended:	Budget and Policy Manager	SG 011

This position assists in directing and managing a team of budget analysts and special assistants in the conduct of: budget analysis; budget administration; policy, productivity and management studies; and other analytic tasks related to major policy areas of City government. The position also has primary responsibility for coordinating strategic planning, performance measurement and program evaluation functions and activities of the Budget and Policy Division.

This position will also assist the Budget and Policy Director, Budget and Policy Manager-Senior, City Economist, and Legislative Fiscal Manager-Senior in coordinating and managing the overall efforts of the Division.

Based on a review of the job description and discussions with the department, the position will continue to have strategic planning and performance management as its primary focus. With the reorganization, the position will likely be more involved in assisting the Budget and Policy Manager-Senior in overall budget, policy and fiscal analysis responsibilities as well as in overall Division administration. However, as one of the senior level positions in the Division, involvement in such responsibilities is currently part of this position.

We therefore concur with the Department's request to retitle this position to Budget and Policy Manager. The requested title is consistent with a position at the same level in the Intergovernmental Relations Division (Legislative Fiscal Manager) which will become part of the Budget and Policy Division in 2004. This position will remain in Salary Grade 011.

Current:	Budget and Management Team Leader	SG 011
Requested:	Budget and Policy Manager - Senior	SG 012
Recommended:	Budget and Policy Manager - Senior	SG 012

Based on the job description and discussions with the department, this position is responsible for the projection and development of the annual city budget. In addition, this position directs and manages a team of professional budget analysts and special assistants in the conduct of budget analysis; budget administration; policy, productivity and management studies; and other analytic tasks related to major policy areas of City government.

The position is also responsible for management of the Fiscal Planning and Budget & Management sections of the Budget and Policy Division, and coordinating the functions of these sections with the Fiscal Policy section, in conjunction with the Budget & Policy Director.

This position assumes the duties of the Budget and Policy Director in his/her absence and represents the Director before various officials, policy-making bodies, and Common Council committees. It also directs and manages certain major administrative activities of the Budget and Policy Division.

This position is currently in Salary Grade 011 with the title of Budget and Management Team Leader. Under the previous division structure the team leader position reported on above led the Strategic and Fiscal Planning section and this position led the Budget Development Administration and Capital Investment section. With the reorganization, this position will directly or indirectly supervise the staff in the Fiscal Planning and Budget and Management Sections and assume leadership of the division in the absence of the Budget and Policy Director. As stated above, a primary function of this position is to assume responsibility for the projection and development of the annual city budget.

The role of this position under the reorganized structure represents a higher level of impact and accountability, knowledge and skills, and reporting relationships responsibility than as currently configured. This position will now be supervising the Salary Grade 011 position reported on above. Based on the projected duties and responsibilities, we recommend the following profile on the management job evaluation factors:

	<u>Level</u>	<u>Points</u>
Impact and Accountability	12	209
Knowledge and Skills	12	213
Reporting Relationships	10	80
Working Conditions	01	<u>05</u>
TOTAL		507

Salary Grade 12: 466-534

The request that this position be reclassified to Salary Grade 012 is appropriate. The department's requested title of Budget and Policy Manager – Senior is consistent with a position at the same level in the Intergovernmental Relations Division (Legislative Fiscal Manager - Senior) which will become part of the Budget and Policy Division in 2004. We therefore concur with the department's request to reclassify this position to Budget and Policy Manager – Senior in Salary Grade 012.

MILWAUKEE PUBLIC LIBRARY

The Milwaukee Public Library has requested that the job titles of two management positions be changed to more accurately reflect the full scope of the duties and responsibilities performed. The job descriptions for these positions were carefully reviewed and the proposed changes were discussed with the department.

Current:	Deputy City Librarian	SG 015
Requested:	Manager of Central Library Services	SG 015
Recommended:	Manager of Central Library Services	SG 015

This position is in charge of the Central Library Services Bureau and has responsibility for developing, directing and overseeing the operations of the public services units of the Central Library which includes Art, Music and Recreation; Ready Reference; Humanities; Science and Business; Periodicals; and Children's Room. In addition, this position performs various administrative functions assigned by the City Librarian.

While this position does assume responsibility for the operation of the library system in the absence of the City Librarian, the requested title more accurately reflects the position's primary function of heading the Central Library Services Bureau. We therefore are in agreement with the requested change. There is no change in the salary grade for this position.

Current:	Assistant City Librarian	SG 013
Requested:	Manager of Neighborhood and Extension Services	SG 013
Recommended:	Manager of Neighborhood and Extension Services	SG 013

This position administers the operations of the Milwaukee Public Library's twelve neighborhood libraries, as well as the Bookmobile and system delivery services. The position is further responsible for overseeing the functions of the Wisconsin Regional Library for the Blind which is headquartered at MPL.

The requested title accurately describes this position's responsibility as head of the Bureau overseeing Neighborhood Libraries and Extension Services. The title of Assistant City Librarian may have been relevant at one time, but with organizational changes occurring over time, the requested title is much more reflective of what the position currently does. We therefore are in accord with the requested change. There is no change in the salary grade for this position.

Prepared By: Timothy J. Keeley
Timothy J. Keeley, Human Resources Representative

Reviewed By: Florence Dukes
Florence Dukes, Employee Relations Director

November 25, 2003