



Department of Employee Relations

November 7, 2001

John O. Norquist
Mayor

Jeffrey Hansen
Director

Florence Dukes
Deputy Director

Frank Forbes
Labor Negotiator

Michael Brady
Employee Benefits Manager

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

Dear Committee Members: Re: Common Council File Number 010791

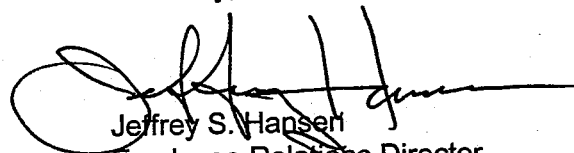
The following reclassifications were approved by the City Service Commission on November 6, 2001.

In the Employees' Retirement System, one position of Administrative Assistant III, Pay Range 530, held by Suzanne Fortier, was reclassified to Office Supervisor II, Salary Grade 002.

In the Health Department, one position of Health Project Assistant, Pay Range 530, held by Robert Colla, was reclassified to Lead Program Information Specialist, Pay Range 558.

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

Sincerely,



Jeffrey S. Hansen
Employee Relations Director

JSH:pb

Attachments: 2 Job Evaluation Reports
 Fiscal Note

c: Frank Forbes, Laura Engan, Anne Bahr, Suzanne Fortier, Dr. Seth Foldy, M.D., Maria Montegudo, Kristina White, Amy Murphy, Robert Colla, Terri Linder, Robert Klaus and John English

JOB EVALUATION REPORT

City Service Commission Meeting Date: October 23, 2001 (Meeting cancelled-resubmitted November 6)

Incumbent: Suzanne Fortier

Department: Employees' Retirement System

Present	Request
Title: Administrative Assistant III Salary: PR 530 (\$33,723-\$38,177) Current Rate: \$38,177	Title: Office Supervisor II Salary: SG 002 (\$33,017-\$46,317) Source: Department
Recommendation: Title: Office Supervisor II Salary: SG 002 (\$33,017-\$46,317) New Rate: \$39,666.64 (Step 7)	
Rationale: <p>Since the implementation of the reorganization of the Employees' Retirement System in the fall of 2000, the nature of work and scope of duties associated with this position have changed significantly. Most significantly, in January of 2001, this position became solely responsible for the supervision of five support staff personnel from various operational sections in the Employees' Retirement System. Prior to the Department's reorganization, this position was responsible for the supervision of one member of support staff.</p>	
History of Position: <p>This position was last studied in July of 2000, as part of the initial departmental classification study conducted by the Department of Employee Relations relating to the restructuring of the Employees' Retirement System. At that time, it was determined that the position was correctly classified with the existing title of Administrative Assistant III in Pay Range 530. Upon the incumbent's appeal to the City Service Commission, it was decided that this position should be reevaluated in nine months.</p>	

Action Required:

In the Positions Ordinance, under Employees' Retirement System, Management Support Services, delete one position of Administrative Assistant III and add one position of Office Supervisor II.

Background:

This position was last studied in July of 2000, as part of the overall departmental classification study conducted by the Department of Employee Relations relating to the restructuring of the Employees' Retirement System. At that time, it was determined that the position was correctly classified with the title of Administrative Assistant III in Pay Range 530. This study was conducted in accordance with the decision of the City Service Commission to have the position reevaluated after implementation of the restructuring.

For this study, the incumbent was interviewed and the department provided a copy of the updated job description.

Duties and Responsibilities:

This position is responsible for supervision of the support staff in the Employees' Retirement System and performing complex clerical, secretarial, and administrative work in keeping official records and assisting in the administration of the standard operating policies and procedures for the Executive Director and ERS Board.

Specific duties and responsibilities according to the job description provided by the department are as follows:

35% Recording Secretary to the Annuity and Pension Board.

- Coordinates all regular, special and committee meetings of the Annuity and Pension Board.
- Prepares Resolution of Appreciation for members leaving the Board.
- Provides to Board members, summaries of legal opinions received from the City Attorney and disability findings received from Hearing Examiners for Board meeting packets.
- Monitors ordinances and resolutions being introduced and reports findings to the Director and Board.
- Takes dictation and records minutes at all meetings of the Board and prepares verbatim transcripts upon request.
- Composes and types the minutes of various meetings of the Annuity and Pension Board.
- Summarizes actions of the Board for follow-up within two days after Board meetings.
- Works closely with Paralegal on legal opinion requests to the City Attorney.

25% Supervises five support staff positions.

Supervision responsibilities include selection and hiring; discipline; establishing work assignments and priorities; reviewing and approving work; evaluating job performance; and planning, scheduling and assignment and training.

15% Confidential Secretary to the ERS Executive Director

Performs complex clerical, secretarial and administrative duties in keeping official records and assisting in the administration of standard operating policies and procedures for the Executive Director.

Monitors, checks and evaluates all incoming correspondence intended for the Executive Director.

Monitors pending legislation before the Common Council committees. Prepares necessary information for use by the Executive Director when appearing before the Finance and Personnel Committee.

Uses ERS' web-based information system to assist the Executive Director by providing information on legal opinions, Board meeting minutes and legislative changes.

Keeps Board members informed of all notices of claim, notices of injury, summons and complaints received by ERS.

Informs the Executive Director of any potential problems arising with staff.

Cross-references legal opinions, Board resolutions and actuary opinions to Chapter 36 of the ERS Law. Apprises other supervisors of any changes that may affect them.

Provides updates to Chapter 36 to the ERS staff, as well as the actuary, auditor, various agencies and consultants.

15% General office management.

Receives the public and answers questions; responds to inquiries from employees, citizens and others; makes appropriate referrals when necessary.

Creates and maintains departmental files, including those related to ERS personnel.

Assesses telephone needs and coordinates installations.

Orders office equipment. Provides training on office equipment and, prior to calling in a service representative to address equipment malfunctions, acts as a troubleshooter for problems with the equipment.

Coordinates and manages all office systems, i.e., phones (moves and changes); security (keys, card keys, off-hour access) and maintenance agreements for copiers, fax machines, office shredders, typewriters, printers, etc.

10% Independently coordinates and supervises the complete process for employee and retiree elections of the Annuity and Pension Board.

This position reports directly to the ERS Executive Director.

According to the job description provided by the department, the qualifications for this position include knowledge of general office practices such as typing, filing, accounting and bookkeeping; five years of increasingly responsible administrative secretarial experience, or any equivalent combination of related education and experience; an Associates Degree in Business Administration, English, Communications or a closely related field; the ability to work well under pressure and meet deadlines; a working knowledge of computers and electronic data processing; the ability to effectively analyze problems and make independent decisions; and strong written and oral communication skills.

Changes in Duties and Responsibilities:

A comparison of the most recent job description provided by the department in October of 2001, with the previous job description on file with the Department of Employee Relations, dated April of 2000, reflects significant change in the scope of duties and the level of responsibility required of this position. Although the position retained all of its former responsibilities, the addition of the responsibility for independently supervising five support staff employees from five different units within the department has significantly changed the scope of the position. As approximately 25% of this positions time is committed to the supervision of these positions, the time allowed to complete other tasks associated with this position has been dramatically decreased.

Standards for Reclassifying Represented and Non-Management/Non-Represented Positions:

According to City Service Commission rules, reclassification can only occur when it has been sufficiently shown that "major changes have occurred in level, duties and responsibilities of the job." Factors that the Commission will not consider with regard to reclassification include the volume of work being performed, technological changes which "alter the way the work is done rather than the work itself," and individual characteristics of the person(s) holding the position.

In other words, the standard for reclassifying jobs to a higher level is not merely the fact that some changes have occurred. The significance of the change(s) and its impact on a position's level of responsibility, overall impact, and required knowledge and skill are what determine the basis for reclassification.

More specifically, in evaluating bargaining unit positions, as well as non-management/non-represented positions, the factor of knowledge and skill is considered to be most important, followed by responsibility exercised, expended effort, and working conditions. A significant change is one that has considerably increased a position's level of responsibility and required knowledge and skill.

In terms of knowledge and skill, the key question that must be answered is this: Is more knowledge and skill now required of this position? If the answer is "yes," the next logical and equally important query that must follow is: Is this part of a normal "learning curve" associated with a person filling the job or have the position's qualifications permanently changed? Reclassification to a higher level typically stems from permanent changes to a position's minimum qualifications.

There are other important questions that must be answered when examining the basis of a request for reclassification. Some of these questions include:

- Does the position now have a significantly broader scope of responsibility in terms of different kinds of things or areas? A good example of this entail combining two or more distinct responsibility areas into one position.
- Does the position now have a higher level of responsibility? In other words, does this position have a specific and verifiable financial responsibility that it did not previously have? Does it have bona fide leadworker responsibilities that it did not previously have? Does it now have responsibility for capital equipment that, at one time, was under the purview of a higher level position?

These and related changes to knowledge and skill, as well as level and scope of responsibility, are what lead to a recommendation for a reclassification to a higher level. These and related changes, therefore, alter positions to the extent that their current classifications and pay allocations are no longer representative or appropriate.

Analysis and Comparison with Other Positions:

Classification files for support staff positions within the City, as well as the City-Wide Office Support Study, were reviewed for this study.

This analysis confirmed that the duties and responsibilities for this position are most comparable to Office Supervisor II positions throughout the City.

As first-line supervisors of office personnel, they assign work, guide, train, lead and evaluate the personnel and work operations in a particular office, service, program or section in City government. As management employees, they have the authority to make decisions regarding hiring, training, job performance, job assignments, discipline and other related matters.

Typical duties and responsibilities for positions classified as Office Supervisor II include the following:

- Performing a variety of administrative duties needed to run an office such as ordering supplies and materials; evaluating equipment, hardware, and software needs and ordering upgrades; creating and maintaining files and filing systems; administering record retention systems; assessing telephone needs and coordinating installations; and maintaining financial, budgetary, personnel, and other types of records.
- Preparing budget documents and supporting documentation for annual and ongoing budget requests. Monitoring budget expenditures. Preparing requisitions and payment certifications for office supplies, equipment, and services.
- Researching and analyzing issues related to the work of the section. Presenting conclusions and recommendations regarding issues, orally and/or in writing.
- Preparing technical, financial, statistical, and other types of written reports.

Requirements for the Office Supervisor II position include four years of clerical experience performing duties related to the position with at least one year of experience at the Office Assistant III level or above. Equivalent combinations of education and experience may be considered.

Summary and Recommendation:

Since the reorganization of the Employes' Retirement System, the nature of the duties and scope of responsibilities have changed significantly with the added supervisory responsibilities. Prior to the reorganization, this position supervised an Administrative Assistant II position. One position of Office Assistant II and one position of Office Assistant III, both of which were previously supervised by the former Pension Counseling Supervisor, are now supervised by the position under study. In addition, the reorganization of the Department resulted in the addition of one Office Assistant III position and a Records Technician position, both of which are now supervised by this position. The positions now fully supervised by the position under study are:

- Administrative Assistant II (1 position)
- Office Assistant III (2 positions)
- Office Assistant II (1 position)
- Records Technician (1 position)
- Temporary Office Assistant (approx. 12 positions during election)

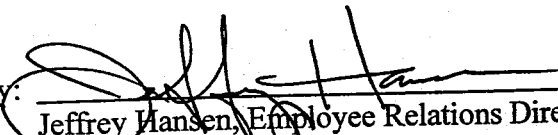
The information gathered by the Department of Employee Relations through the updated job description, a job analysis questionnaire completed by the incumbent and approved by the Employees' Retirement System Executive Director, and interviews conducted with the incumbent, reflect that this position is no longer correctly classified as Administrative Assistant III.

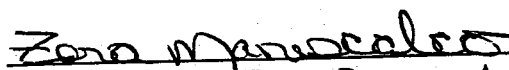
Under the Management Classification and Pay Plan, the position factors out as follows:

<u>Factor</u>	<u>Level</u>	<u>Points</u>
Impact & Accountability	2	52
Knowledge & Skills	3	49
Relationship Responsibility	3	22
Working Conditions	1	<u>5</u>
Total		128

A total of 128 points places the position in SG 002 (115-131)

We, therefore, recommend reclassifying this position to the title of Office Supervisor II in Salary Grade 002 (\$33,017-46,317).

Reviewed by: 
Jeffrey Hansen, Employee Relations Director

Study Conducted by: 
Zora Maniscalco, Human Resources Analyst-Senior

JOB EVALUATION REPORT

City Service Commission Meeting Date: October 23, 2001 (Meeting cancelled-resubmitted November 6)

Incumbent: Robert Colla Department: HEALTH DEPARTMENT

Present	Request
Title: Health Project Assistant	Title: Lead Program Information System Coordinator
Salary: Pay Range 530 (\$33,723-\$38,177)	Salary: Not stated.
Current Rate: \$38,177	Source: Health Department
<p>Recommendation: Title : Lead Program Information Specialist Salary: Pay Range 558 (\$37,877 \$-46,530) New Rate: \$39,118</p>	
<p>Rationale: This grant funded position has evolved from a support position providing administrative assistance in support of data collection and reporting activities to a leadership role in developing data programs for the Childhood Lead Poisoning Prevention Program. Based on the higher level of duties and responsibilities required for this position, we recommend that this position be graded and classified as a Lead Program Information Specialist, Pay Range 558.</p>	
<p>History of Position: This position was created in 1995 and no job study has been done since its creation.</p>	

Action Required:

In the Salary Ordinance, under Pay Range 558, add the title of: "Lead Program Information Specialist".

In the Positions Ordinance, under Health Department, Home Environmental Health Division, Childhood Lead Poisoning Prevention Program (W), delete one position of Health Project Assistant (W) and add one position of Lead Program Information Specialist (W).

Background:

On October 26, 2000, we received a request from Seth Foldy, M.D., Health Department Commissioner, to conduct a classification study for this position. The Department of Employee Relations received the job description for this position and a completed Job Analysis questionnaire. Discussions were held with the incumbent, his supervisor, Kris White, Amy Murphy, Home Environmental Health Manager and Maria Monteagudo, Health Personnel Officer in May, June and September of this year.

Duties and Responsibilities:

- The basic function of the position is to assure efficient operation, maintenance and quality assurance of all Childhood Lead Poisoning Prevention Program (CLPPP) Information Systems, especially STELLAR, and ensure their effective integration into the overall program and department operations. This position monitors and directs the day to day operation of the STELLAR data entry staff and coordinates the quality control and quality assurance efforts of the CLPPP data management functions. It is responsible for all CLPPP surveillance activities, data management functions, reporting and analysis and provides management and strategic planning of CLPPP Information System Resources. (*STELLAR (Systematic Tracking of Elevated Lead Levels and Remediations) is a proprietary database management software package developed by the Centers for Disease Control and Prevention that has the capacity to be customized and expanded for specific program needs.*)
- 20% STELLAR Database Coordinator
 - Maintains all operations of the STELLAR database.
 - Trains employees in the use of STELLAR and other proprietary databases.
 - Reviews and monitors input performance to assure data quality.
 - Establishes data input priorities and schedules.
 - Communicates with managers to maintain staffing levels for timely and accurate data input and processing.
 - Develops, maintains and monitors the STELLAR quality control program.
 - Analyzes and solves problems occurring with the STELLAR and other databases. Coordinates problem solving with department IT staff as appropriate.
 - Reports STELLAR problems to the Centers for Disease Control and coordinates correction of problem.
 - Holds meeting with STELLAR users for information, updates and problem solving.
 - Makes suggestions for improving data management and reporting systems.
 - Writes training protocols, trains employees and updates training procedures as appropriate.
 - Evaluates software upgrades and communicates effect to all staff. Implements upgrades and provides training to all staff.
 - Recommends software and program changes, which will enhance the system, program service delivery and monitoring, and program quality assurance.
 - Executes daily Lab Batch and monitors daily reports printing.
 - Performs all routine maintenance on STELLAR.
 - Coordinates all program data issues with State Lead Program, including data acquisition from private clinical laboratories.
 - Submits data extract annually to CDC National Lead Poisoning Prevention surveillance Database and coordinates corrections.

- Liaisons with other departmental information system personnel to assure departmental computerization goals are met
- Inputs data into STELLAR when necessary.
- 60% Data Management and Reporting:
 - Extracts, manipulates, reports and interprets customized information from STELLAR (and other proprietary CLPPP databases) for the following purposes: program strategic planning and evaluation, trend analysis, service delivery management and quality assurance, academic research support, legislation support, public records requests, program quarterly and annual statistics, program QA/QC functions, time line analysis and reports to funding agencies.
 - Liaisons for CLPPP for program data issues with the federal Environmental Protection Agency, the Centers for Disease Control, Housing and Urban Development, state of Wisconsin Department of Health and Family Services, private medical providers, private clinical laboratories, other city departments, community health departments and community organizations.
 - Creates and maintains and updates CLPPP web pages.
 - Coordinates with staff to identify, plan and implement solutions for program data needs.
 - Maintain and report from other program databases besides STELLAR.
- 15% Information Technology Management:
 - Directs upgrades, expansion, enhancements and coordination of all CLPPP information hardware and software applications.
 - Installs all information hardware and software applications.
 - Trains staff in proper use of existing and newly acquired hardware and software applications.
 - Maintains existing hardware and software. Troubleshoots all hardware and software problems. Communicates to and coordinates with department IT staff as necessary.
 - Reports CLPPP IT status to and coordinates CLPPP IT planning with department System Coordinator
- 5% Other Duties:
 - Participates as program representative on the Health Department Internet Page Planning Committee.
 - Co-chairs CLPPP Internet Page Planning Committee. Coordinates program web page design and content.
 - Serves on other IT related committees as they occur.

This position monitors and directs the day-to-day operation of the STELLAR data entry staff of up to 6 Office Assistants.

The minimum qualifications of this position include a Bachelor of Science Degree in Information Technology or related field and three years experience with and working

knowledge of relational databases and personal computer hardware and software and basic understanding of networks. It also requires demonstrated leadership skills, ability to exercise independent judgement, good interpersonal skills and good oral and written communication skills.

Changes in Duties and Responsibilities

The level of duties and responsibilities of this position has significantly increased as a result of the expanded service levels of the lead program. Initially, this position's basic function was to manage the Childhood Lead Poisoning Prevention Program (CLPPP) data management system (STELLAR) for one lead program intervention. This position has evolved along with the expanded service levels of the lead program. The STELLAR database has been customized by the individual in this position to meet the needs of the multi-interventions of the Milwaukee CLPPP. Such multiple interventions include the Pilot Project for Lead Based Paint Hazard Control and a 2001-community block grant.

This position evolved from providing administrative assistance in support of data collection to functioning in a leadership role in data collection. This position recommends the best data and best data systems to meet the program needs and participates in the lead management team meetings as an integral member of the team. The Data analysis and reporting function of this position has increased dramatically since its inception. According to the Manager of this program, accurate data has a great impact on the lead program: it drives the direction of the program. This position determined how to use the existing data to support policy shift in services to the Pilot Ordinance.

This position initially received all data requests through one supervisor. As a result of a change to a flat structure in the Health Department Division, health department managers go directly to the individual in this position with their data needs. This position manages and prioritizes the multiple data requests from multiple managers. This position has evolved from a support person, taking directions from one program supervisor to a point person, where multiple program managers make data needs requests.

The individual in this position also acts as the Health department liaison with private contractors and functions as a Health Department representative on State Level committees.

Standards for Reclassifying Represented and Non-Management Non-Represented Positions

City Service Commission rules specify that reclassification can occur only when "major changes have occurred in level, duties and responsibilities of the job."

The standard for reclassifying jobs to a higher level is not merely the fact that some changes have occurred. The significance of the change(s) and the impact on a position's level of responsibility, overall impact, and required knowledge and skill are what determine whether there is an acceptable basis for a reclassification request. The factor of

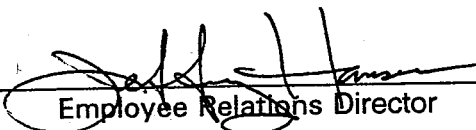
knowledge and skill is considered to be most important, followed by responsibility exercised, expended effort, and working conditions. A significant change is one that has considerably increased a position's level of responsibility and required knowledge and skill.

Analysis and Recommendation:

When this position was classified in 1995, its major function was to coordinate all aspects of the Department's data management system for the prevention of childhood lead poisoning. Since 1995, the service levels of the lead program have expanded significantly and the data management system has been customized to reflect the multi-interventions of the program. The position has evolved to a leadership role for all CLPPP related to data management, surveillance and information technology.

The majority of this position duties and responsibilities are in data management and reporting. The remainder of the duties are related to maintaining the STELLAR database and information technology management. This position is unique, and the several other positions were reviewed from Database Specialist, the Network Analyst series, the Planner Series in the Department of City Development and the Network Manager and Network Service Coordinator Senior positions in the Department of Neighborhood Services. After review of comparable levels of duties and responsibilities and skills and knowledge required for these various positions, and in consideration of the internal equities within the Health Department, we recommend that this position be graded and classified as a Lead Program Information Specialist, Pay Range 558.

Prepared by: 
Human Resources Representative

Reviewed by: 
Employee Relations Director