



## Department of Employee Relations

REVISED 11/13/2022

**Cavalier Johnson**  
Mayor

**Harper Donahue, IV**  
Director

**Renee Joos**  
Employee Benefits  
Director

**Nicole M. Fleck**  
Labor Negotiator

November 13, 2022

The Honorable  
Finance and Personnel Committee  
Common Council  
City of Milwaukee

*Common Council File No. 221005– Communication from the Department of Employee Relations relating to classification studies scheduled for the November 15, 2022 City Service Commission meeting.*

Dear Committee Members:

The following classifications and pay recommendations are scheduled for the City Service Commission meeting on November 15, 2022.

### Common Council – City Clerk and Employees’ Retirement System

Current	Recommended
Document Services Manager PR 1DX (\$55,962 - \$78,342) (One Position – CC/CC)	Document Services Manager PR 1DX (\$55,962 - \$78,342) FN: Recruitment at \$67,441/any point with DER approval. FN: An employee possessing an ICRM certification to be paid an additional 3%. (One Position – CC/CC)
Document Services Supervisor PR 2CN (\$40,678 - \$56,941) (Two Positions – CC/CC)	Document Services Supervisor PR 2CN (\$40,678 - \$56,941) FN: Recruitment at \$49,470/any point with DER approval. (Two Positions – CC/CC)
Program Assistant II PR 5FN (\$41,326 - \$49,213) FN: Recruitment at \$43,390/any point with DER approval (One Position – ERS-Records Management)	Records Services Supervisor PR 2CN (\$40,678 - \$56,941) FN: Recruitment at \$49,470/any point with DER approval (One Position – ERS-Records Management)
Document Technician PR 3CN (\$38,205 - \$43,197) (Five Positions – CC/CC)	Document Technician III* PR 3GN (\$41,326 - \$49,213) (Five Positions – CC/CC)
	Document Technician II* PR 3FN (\$39,278 - \$48,114) (Underfill Title)
	Document Technician I* PR 3EN (\$37,869 – \$46,298) (Underfill Title)

Records Technician II PR 6EN (\$31,824 - \$36,641) (Two Positions – ERS)	Records Technician II* PR 3FN (\$39,278 - \$48,114) (Two Positions - ERS)
Records Technician I PR 6CN (\$31,824 - \$33,569) (Underfill Title)	Records Technician I* PR 3EN (\$37,869 – \$46,298) (Underfill Title)

Note: Residents receive a rate that is 3% higher.

### Comptroller's Office

Current	Recommended
Functional Applications Manager PR 1IX (\$76,988 - \$107,782) (One Position)	Functional Applications Manager PR 1JX (\$82,051 - \$114,879) FN: Minimum Recruitment \$100,920 (One Position)
FMIS Project Manager PR 2LX (\$72,244 - \$101,137) (One Position)	FMIS Project Manager PR 2MX (\$76,988 - \$107,782) FN: Minimum Recruitment \$94,456 (One Position)
Functional Applications Analyst-Senior PR 2JX (\$63,585 - \$89,016) (One Position)	Functional Applications Analyst-Senior PR 2KX (\$67,763 - \$94,870) FN: Minimum Recruitment \$74,539 (One Position)
Functional Applications Analyst PR 2HX (\$55,965 - \$78,342) (Underfill Title)	Functional Applications Analyst PR 2JX (\$63,585 – \$89,016) FN: Minimum Recruitment \$69,943 (Underfill Title)
Comptroller Network Administrator PR 2IX (\$59,632 - \$83,481) (One Position)	Comptroller Network Administrator PR 2JX (\$63,585 – \$89,016) FN: Minimum Recruitment \$69,943 (One Position)
Financial Systems Analyst PR 2GX (\$52,498 - \$73,504) (One Position)	Financial Systems Analyst PR 2JX (\$63,585 – \$89,016) FN: Minimum Recruitment \$69,943 (One Position)

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### Employees' Retirement System

Current	Recommended
ERS-Disability Deputy Director PR 1JX (\$82,051 - \$114,879) (One Position)	Employees' Retirement System - Deputy Director PR 1QX (\$127,560 – \$178,577) FN: Minimum Recruitment \$150,520 and may be at any rate upon approval of DER and Chair of F&P. (One Position)
Pension Investment Analyst-Senior PR 2OX (\$87,472 - \$122,465) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. (Three Positions)	ERS Pension Investment Analyst V PR 2TX (\$120,339 - \$168,469) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Three Positions)
New Underfill Title	ERS Pension Investment Analyst IV PR 2SX (\$112,903 - \$158,060) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board.

	FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Underfill Title)
Pension Investment Analyst PR 2MX (\$76,988 - \$107,782) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. (Underfill Title)	ERS Pension Investment Analyst III PR 2RX (\$105,918 - \$148,289) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Underfill Title)
New Underfill Title	ERS Pension Investment Analyst II PR 2QX (\$99,369 - \$139,123) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Underfill Title)
Pension Investment Analyst-Associate PR 2KX (\$67,763 - \$94,870) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. (Underfill Title)	ERS Pension Investment Analyst I PR 2PX (\$93,232 - \$130,521) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Underfill Title)

Note: Residents receive a rate that is 3% higher.

### Health Department

Current	Recommended
New Position	Program Assistant III PR 5IN (\$47,274 - \$55,763) FN: Recruitment at \$48,735 (One Position)
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Note: Residents receive a rate that is 3% higher

Respectfully Submitted,



Harper Donahue, IV  
Employee Relations Director

Attachments: Job Evaluation Reports  
Fiscal Impact Statement



## Department of Employee Relations

**Cavalier Johnson**  
Mayor

**Harper Donahue, IV**  
Director

**Renee Joos**  
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Employee Benefits

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Labor Negotiator

### Job Evaluation Report

City Service Commission Meeting: November 15, 2022

#### Common Council – City Clerk and Employees’ Retirement System

Current	Recommended
Document Services Manager PR 1DX (\$55,962 - \$78,342) (One Position – CC/CC)	Document Services Manager PR 1DX (\$55,962 - \$78,342) FN: Recruitment at \$67,441/any point with DER approval. FN: An employee possessing an ICRM certification to be paid an additional 3%. (One Position – CC/CC)
Document Services Supervisor PR 2CN (\$40,678 - \$56,941) (Two Positions – CC/CC)	Document Services Supervisor PR 2CN (\$40,678 - \$56,941) FN: Recruitment at \$49,470/any point with DER approval. (Two Positions – CC/CC)
Program Assistant II PR 5FN (\$41,326 - \$49,213) FN: Recruitment at \$43,390/any point with DER approval (One Position – ERS-Records Management)	Records Services Supervisor PR 2CN (\$40,678 - \$56,941) FN: Recruitment at \$49,470/any point with DER approval (One Position – ERS-Records Management)
Document Technician PR 3CN (\$38,205 - \$43,197) (Five Positions – CC/CC)	Document Technician III* PR 3GN (\$41,326 - \$49,213) (Five Positions – CC/CC)
	Document Technician II* PR 3FN (\$39,278 - \$48,114) (Underfill Title)
	Document Technician I* PR 3EN (\$37,869 – \$46,298) (Underfill Title)
Records Technician II PR 6EN (\$31,824 - \$36,641) (Two Positions – ERS)	Records Technician II* PR 3FN (\$39,278 - \$48,114) (Two Positions - ERS)
Records Technician I PR 6CN (\$31,824 - \$33,569) (Underfill Title)	Records Technician I* PR 3EN (\$37,869 – \$46,298) (Underfill Title)

Note: Residents receive a rate that is 3% higher.

\*Per Part II, Section 3 (C) of the Salary Ordinance, positions classified as “Technicians” under Part I, Section 3 of the Salary Ordinance, may be recruited at any point in the range with DER approval.

The Office of the Common Council – City Clerk (CC/CC) requested a classification and labor market study of their five positions of Document Technician due to changes in the level of duties and responsibilities, and difficulties in recruitment and retention. To prevent pay compression, labor market data for the supervisors and manager of these positions was also reviewed. As a result, we recommend new recruitment rates for both classifications plus an additional 3% for possessing an ICRM certification for the Document Services Manager.

Two related positions of Records Technician II in the Employees' Retirement System (ERS) are also included in this report. Based on labor market data we recommend a higher rate of pay. To prevent pay compression, labor market data for the Program Assistant II position that supervises these positions was also reviewed. In addition, a review was made of the duties and responsibilities, and we recommend a reclassification to a new title and pay range to reflect the focus of the position and the supervisory responsibility.

Job descriptions and other data were provided; and discussions were held with Dana Zelazny, Deputy City Clerk, Bradley Houston, City Records Officer, and Melody Johnson, Employee Retirement System - Deputy Director.

Please note that the Staffing Division may not yet have assessed the requirements for all these positions and equivalent combinations of education and experience may be considered.

### Market Pay Data

Below is market pay data for similar positions in southeastern Wisconsin from the Economic Research Institute (ERI), a service to which the Department of Employee Relations (DER) subscribes.

#### Document Control Supervisor with three years of experience

10%	25%	Mean	75%	90%
\$60,841	\$66,189	\$73,264	\$80,255	\$87,316

*Supervises the coordination and tracking of records, information, and documentation from receipt throughout its entire life cycle; develops and implements document control systems within an organization, and assures documentation is systematically managed and aligned within the organization's systems and processes; and reviews, recommends, and revises organizational business policies to achieve compliance with records information policies, goals, and objectives.*

#### Document Manager with three years of experience

10%	25%	Mean	75%	90%
\$53,474	\$58,100	\$64,234	\$70,246	\$76,338

*Controls and manages security, accessibility, availability, verification, proper distribution, and timeliness of organizational documents and materials that may benefit and be used to get information on policies, procedures, regulations, methods, templates, and training materials; develops and provides updates to a document management plan; and manages and maintains organizational documentation through the complete document life cycle.*

#### Records Section Supervisor with one year of experience

10%	25%	Mean	75%	90%
\$45,595	\$49,157	\$54,003	\$58,602	\$63,368

*Supervises and coordinates activities of workers engaged in maintaining central records and files; oversees and aids workers in filing, storing, retrieving, checking, correcting, copying, refilling, and setting up new files*

*for all types of documents and company records; and assures all correspondence is scanned and indexed accurately, and filed appropriately.*

**Records Management Specialist with one year of experience**

10%	25%	Mean	75%	90%
\$41,696	\$44,954	\$49,402	\$53,638	\$58,061

*Archives, logs, audits, and preserves digital documents and responds to information requests; creates and maintains digital filing and retrieval systems and may perform physical filing as well as digital; and prepares and ships outgoing documents and mail.*

**Document Retention Specialist with one year of experience**

10%	25%	Mean	75%	90%
\$38,634	\$41,845	\$46,079	\$50,142	\$54,400

*Assists in daily activities for the operations of the organization’s document retention activities and processes, maintaining electronic and hard-copy controlled documents, department files, and resource materials; carries out the operational requirements that result from policies, procedures, regulations, and guidance governing the management of documents that exist in print and electronic form; prepares, adheres to, and controls the record retention schedule; maintains records inventory and other records associated with retention and destruction of documents; and manages method for disseminating information.*

**Document Management Technician with one year of experience**

10%	25%	Mean	75%	90%
\$31,689	\$33,585	\$36,423	\$38,763	\$41,314

*Operates and keeps systems maintained for the collection, classification, retrieval, and retention of records, images, documents, and information; takes care of a company’s documents and records electronically; arranges, prepares, and purges historical and other documents and files from the physical files following established protocols; prepares files for imaging and scans and indexes files into the document imaging or management system; creates new policies and procedures that deal with document storage, sharing, sending, and destruction; oversees onsite shredding of documents; and maintains the document destruction calendar.*

**Position Descriptions and Recommendations**

Current	Document Services Manager	PR 1DX (\$55,962 - \$78,342)	One Position
Recommended	Document Services Manager	PR 1DX (\$55,962 - \$78,342) FN: Recruitment at \$67,441/any point with DER approval. FN: An additional 3% for possessing an ICRM certification	One Position

Under the direction of the City Clerk, this position serves as the chief liaison for the City of Milwaukee on matters of enterprise-wide compliance with local, state, and federal laws and regulatory agencies relating to access to and preservation of public records.

Minimum requirements include a bachelor’s degree in business administration, information management, library or computer science, public administration, or related field; and three years of experience in performing records management in a public agency or large organization carrying out duties related to

this position including overseeing digital and physical records retention and ensuring compliance with local, state, and federal laws.

Current	Document Services Supervisor	PR 2CN (\$40,678 - \$56,941)	Two Positions
Recommended	Document Services Supervisor	PR 2CN (\$40,678 - \$56,941) FN: Recruitment at \$49,470/any point with DER approval.	Two Positions

These positions supervise the daily activities and services provided by the document services center staff and contribute to the growth and development of operations as well as the citywide records management program.

Minimum requirements include an associate degree in business administration, information management, library or computer science, or related field; and three years of related work experience such as government accounting, budgetary planning, and purchasing processes including development of technical specifications for equipment and service contracts related to records and information software, computer equipment, programs, and projects.

Current	Program Assistant II (ERS – Records Management)	PR 5FN (\$41,326 - \$49,213) FN: Recruitment at \$43,390/any point with DER approval.	One Position
Recommended	Records Services Supervisor	PR 2CN (\$40,678 - \$56,941) FN: Recruitment at \$49,470/any point with DER approval.	One Position

This position works directly with ERS management and staff to develop and execute a records filing and retention plan specific to ERS; guides staff on the use of imaging and provides expert knowledge in indexing a variety of essential business documents; supervises and mentors two Records Technician positions; works to further integrate Records Management best practices into the department's business practices; and oversees the administrative withdrawal procedures and GPS lump-sum bonus payments and adjustments, including retro payments, by initiating batch reports and subsequent workflow processes.

Minimum requirements include five years of related administrative experience with at least one year of providing administrative support in a leadership role.

Based on labor market data, comparison to other City positions, and to better reflect the focus of this position and the supervisory and oversight responsibilities, we recommend reclassifying this position to Records Services Supervisor in Pay Range 2CN (\$40,678 - \$56,941) with recruitment at \$49,470 and at any point in the range with approval by the Department of Employee Relations.

Current	Document Technician	PR 3CN (\$38,205 - \$43,197)	Five Positions
Recommended	Document Technician III	PR 3GN (41,326 - \$49,213)	Five Positions
	Document Technician II	PR 3FN (\$39,278 - \$48,114)	Underfill Title
	Document Technician I	PR 3EN (\$37,869 - \$46,298)	Underfill Title

These positions participate in conversion of records to digital form and assist with the operations of the records center including records transfer, storage operations, request fulfillment, and destruction of records in various media formats.

Minimum requirements include one year of experience working in an office, library, mailroom, or warehouse environment with direct experience processing documents using scanning equipment.

The department indicated that the duties and responsibilities of these positions have evolved so that they are now working with a more complex indexing of records, and reference and research questions. These positions are also being cross trained so they can perform all aspects of the job including mail handling and on-demand document imaging. With these changes, and to help with recruitment and retention, this report recommends creating three levels of Document Technician.

Document Technician I would be an entry level underfill title in which incumbents would perform the duties and responsibilities listed above.

Document Technician II would be a journey level underfill title in which incumbents would perform the duties and responsibilities listed above plus other duties including operating the large format scanner for oversized drawings such as building plans; and assisting with the basic arrangement and description of archival records and City mail services including mail metering and incoming mail service.

Document Technician III would be a lead level title in which incumbents would perform the work listed for the I and II level plus serve as a lead for one or more functional area such as document imaging, records center operations, reference services, mail services, and/or records disposition; serve as a resource for other Document Technicians; and advise the Supervisor or Manager on issues or operations of their designated unit.

These five positions would be authorized at the Document Technician III level. When the recommendations of this report are implemented, incumbents will be promoted into the title of Document Technician I. When the recruitment flexibility matrix is finalized, current and new employees will be placed prospectively into the appropriate title and pay rate based upon the employee's related experience and credentials with the Department of Employee Relations (DER) approval.

Current	Records Technician II	PR 6EN (\$31,824 - \$36,641)	Two Positions
	Records Technician I	PR 6CN (\$31,824 - \$33,569)	Underfill Title
Recommended	Records Technician II	PR 3FN (\$39,278 - \$48,114)	Two Positions
	Records Technician I	PR 3EN (\$37,869 - \$46,298)	Underfill Title

These positions maintain Employees' Retirement System (ERS) source documents, records, electronic files, and data; and scan and index documents to initiate workflow in MERITS (Milwaukee Employee Information Technology System).

Minimum qualifications include one year of office experience performing related duties including data entry, filing, and working with Microsoft Windows XP and the Microsoft Office Suite.

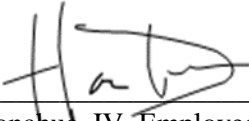


**Action Required – Effective Pay Period 24, 2022 (November 13, 2022)**

**\* See addendum included in CCFN: 221005 for Salary and Position Ordinance changes.**

Prepared by:           Sarah Trotter            
Sarah Trotter, Human Resources Representative

Reviewed by:           Andrea Knickerbocker            
Andrea Knickerbocker, Human Resources Manager

Reviewed by:                       
Harper Donahue, IV, Employee Relations Director



## Department of Employee Relations

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### Job Evaluation Report

City Service Commission Meeting: November 15, 2022

#### Comptroller's Office

Current	Recommended
Functional Applications Manager PR 1IX (\$76,988 - \$107,782) (One Position)	Functional Applications Manager PR 1JX (\$82,051 - \$114,879) FN: Minimum Recruitment \$100,920 (One Position)
FMIS Project Manager PR 2LX (\$72,244 - \$101,137) (One Position)	FMIS Project Manager PR 2MX (\$76,988 - \$107,782) FN: Minimum Recruitment \$94,456 (One Position)
Functional Applications Analyst-Senior PR 2JX (\$63,585 - \$89,016) (One Position)	Functional Applications Analyst-Senior PR 2KX (\$67,763 - \$94,870) FN: Minimum Recruitment \$74,539 (One Position)
Functional Applications Analyst PR 2HX (\$55,965 - \$78,342) (Underfill Title)	Functional Applications Analyst PR 2JX (\$63,585 - \$89,016) FN: Minimum Recruitment \$69,943 (Underfill Title)
Comptroller Network Administrator PR 2IX (\$59,632 - \$83,481) (One Position)	Comptroller Network Administrator PR 2JX (\$63,585 - \$89,016) FN: Minimum Recruitment \$69,943 (One Position)
Financial Systems Analyst PR 2GX (\$52,498 - \$73,504) (One Position)	Financial Systems Analyst PR 2JX (\$63,585 - \$89,016) FN: Minimum Recruitment \$69,943 (One Position)

\*Note: Residents receive a rate that is 3% higher.

#### Background

This report aligns information technology positions with related financial positions in the Comptroller's office. Rates of pay for financial positions in the Comptroller's office changed with the previous city-wide report for business/financial and human resources titles throughout City government.

As with the previous studies the analysis and recommendation process included a review of a position's duties and responsibilities, impact and accountability, relationship responsibilities, working conditions, as well as minimum education and experience requirements.

This process also compared a classification's rate of pay to the cost of labor in Southeastern Wisconsin. The recommendations reallocate the rates of pay for classifications based upon a comparison to market

rates of pay. These reallocations are not reclassifications. Employees in these titles will receive a rate increase only if their current base pay rate falls below the new minimum recruitment rate for their title.

Current	Recommended
Functional Applications Manager PR 1IX (\$76,988 - \$107,782) (One Position)	Functional Applications Manager PR 1JX (\$82,051 - \$114,879) FN: Minimum Recruitment \$100,920 (One Position)

This Functional Applications Manager leads the Financial Systems Support division of the Comptroller's Office. The position provides project management and application support for PeopleSoft Financials, Payroll and related interfaces. Responsibilities include managing open records data requests.

Current	Recommended
FMIS Project Manager PR 2LX (\$72,244 - \$101,137) (One Position)	FMIS Project Manager PR 2MX (\$76,988 - \$107,782) FN: Minimum Recruitment \$94,456 (One Position)

The FMIS Project Manager provides primary functional support for the overall operation of the PeopleSoft Financial application software for the City of Milwaukee including configuration, testing, reporting, and data analysis.

Current	Recommended
Functional Applications Analyst-Senior PR 2JX (\$63,585 - \$89,016) (One Position)	Functional Applications Analyst-Senior PR 2KX (\$67,763 - \$94,870) FN: Minimum Recruitment \$74,539 (One Position)
Functional Applications Analyst PR 2HX (\$55,965 - \$78,342) (Underfill Title)	Functional Applications Analyst PR 2JX (\$63,585 - \$89,016) FN: Minimum Recruitment \$69,943 (Underfill Title)

The Functional Applications Analyst-Senior provides system support to the Comptroller's Office's applications and network. Responsibilities include coordinating application support and transaction analysis of the PeopleSoft HRMS payroll system. Duties also involve providing programming support for open records requests. The Functional Applications Analyst title is an underfill title to the higher Senior title.

Current	Recommended
Comptroller Network Administrator PR 2IX (\$59,632 - \$83,481) (One Position)	Comptroller Network Administrator PR 2JX (\$63,585 - \$89,016) FN: Minimum Recruitment \$69,943 (One Position)

The Comptroller Network Administrator manages information technology projects for the Comptroller's Office. The position provides advanced-level network analysis and technical support. Responsibilities include strategic IT planning, equipment procurement, hardware and software implementation, IT project management and support for IT related resources.

Current	Recommended
Financial Systems Analyst PR 2GX (\$52,498 - \$73,504) (One Position)	Financial Systems Analyst PR 2JX (\$63,585 – \$89,016) FN: Minimum Recruitment \$69,943 (One Position)

The Financial Systems Analyst provides primary functional support for the overall operation of the Peoplesoft Financial Management Information System to City departments and staff.

### Labor Market Comparisons

For positions in this report, comparisons were made to the labor market using the Economic Research Institute (ERI), a salary survey to which DER subscribes. The breadth of data shown below represents competitive rates of pay for a title comparable to the classifications listed above.

### Systems Analyst Lead

Years of Experience	Base Salaries					Incentive					Total Cash				
	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile
6	92,680	101,611	113,048	124,641	135,874	3,302	3,623	4,026	4,453	4,858	95,982	105,234	117,074	129,094	140,732
5	89,352	97,967	109,033	120,251	131,170	3,095	3,397	3,778	4,179	4,562	92,447	101,364	112,811	124,430	135,732
4	85,889	94,169	104,839	115,658	126,221	2,892	3,174	3,530	3,907	4,267	88,781	97,343	108,369	119,565	130,488
3	82,324	90,251	100,500	110,899	121,080	2,691	2,954	3,286	3,638	3,975	85,015	93,205	103,786	114,537	125,055
2	78,692	86,254	96,062	106,020	115,798	2,496	2,740	3,046	3,374	3,689	81,188	88,994	99,108	109,394	119,487
1	75,034	82,222	91,574	101,070	110,432	2,306	2,531	2,814	3,119	3,410	77,340	84,753	94,388	104,189	113,842

*Heads professional-level systems analysts engaged in the activities of solving computer problems and enabling computer technology to meet the needs of the organization. Oversees systems analysts in performing system studies to assist organization to realize maximum benefit from investments in equipment, personnel, and business processes. Assigns and coordinates work of systems analyst personnel, and aids management in other supervisory responsibilities as requested. Position is distinguished from a supervisor as position does not have full responsibility for recruiting, hiring, promotions, transfers, and disciplinary actions. Consults with managerial and systems analysis personnel to clarify program intent, identify problems, suggest changes, and determine extent of programming and coding required. Develops programs from workflow charts or diagrams, considering factors, such as computer storage capacity and speed, extent of peripheral equipment, and intended use of output data. Converts workflow charts to language that can be processed by computer. Enters program codes into computer. Enters test data into computer. Analyzes test runs on computer to correct or direct correction of coded program and input data. Revises or directs revision of existing programs to increase operating efficiency or adapt to new requirements. Compiles documentation of program development and subsequent revisions. Trains subordinates in programming and program coding. Prescribes standards for terms and symbols used to simplify interpretation of programs. Collaborates with computer manufacturers and other users to develop new programming methods. Prepares records and reports.*

### Systems Analyst Supervisor

Years of Experience	Base Salaries					Incentive					Total Cash				
	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile
6	86,757	95,121	105,892	116,812	127,466	4,181	4,590	5,103	5,648	6,168	90,938	99,711	110,995	122,460	133,634
5	84,153	92,262	102,728	113,344	123,723	3,991	4,381	4,873	5,395	5,893	88,144	96,643	107,601	118,739	129,616
4	81,500	89,346	99,495	109,796	119,886	3,804	4,174	4,644	5,142	5,619	85,304	93,520	104,139	114,938	125,505
3	78,812	86,386	96,209	106,182	115,973	3,618	3,971	4,416	4,891	5,347	82,430	90,357	100,625	111,073	121,320
2	76,101	83,400	92,885	102,518	112,003	3,436	3,769	4,193	4,645	5,078	79,537	87,169	97,078	107,163	117,081
1	73,384	80,402	89,544	98,828	107,997	3,256	3,573	3,973	4,402	4,814	76,640	83,975	93,517	103,230	112,811

*Supervises employees engaged in systems analysis activities to solve computer problems and enable computer technology to meet individual needs of an organization. Analyzes and/or oversees analysis to improve return on investments in equipment, personnel, and business processes. Assigns, coordinates, and reviews work of systems analysis personnel. Activities supervised include, but are not limited to, developing programs from workflow charts*

or diagrams; preparing flowcharts, specifications, and diagrams to be used for writing programs; entering program codes into computer; entering test data into computer; evaluating and analyzing existing and proposed data and procedures to design computer-based solutions to business problems; and analyzing test runs on computer. Consults with managerial and systems analysis personnel to clarify program intent, identify problems, suggest changes, and determine extent of programming and coding required. Revises or directs revision of existing programs to increase operating efficiency or adapt to new requirements. Compiles documentation of program development, and subsequent revisions. Prescribes standards for terms and symbols used to simplify interpretation of programs. Collaborates with computer manufacturers and other users to develop new programming methods. Prepares records and reports. May recruit, hire, train staff, evaluate employee performance, and recommend or initiate promotions, transfers, and disciplinary action.

**IT Manager**

Years of Experience	Base Salaries					Incentive					Total Cash				
	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile
6	83,654	91,087	100,750	110,419	119,978	5,282	5,757	6,359	6,993	7,605	88,936	96,844	107,109	117,412	127,583
5	81,016	88,211	97,580	106,950	116,232	5,082	5,539	6,119	6,730	7,319	86,098	93,750	103,699	113,680	123,551
4	78,349	85,300	94,368	103,432	112,427	4,881	5,321	5,878	6,465	7,034	83,230	90,621	100,246	109,897	119,461
3	75,658	82,363	91,124	99,873	108,575	4,681	5,103	5,637	6,201	6,748	80,339	87,466	96,761	106,074	115,323
2	72,952	79,408	87,857	96,286	104,688	4,484	4,886	5,399	5,939	6,463	77,436	84,294	93,256	102,225	111,151
1	70,242	76,446	84,581	92,684	100,780	4,288	4,672	5,161	5,678	6,180	74,530	81,118	89,742	98,362	106,960

Designs, develops, implements and manages an organization's information technology infrastructure, including computer application systems, computer and communication systems, network and related systems. Establishes and maintains information technology policies, procedures and standards. Manages all aspects of hardware and software inventory and procurement, including audits to ensure hardware and software comply with standards, policies and configuration guidelines; hardware and software maintenance; evaluation and purchase of new hardware and software; and negotiation with vendors for software licenses. Monitors information technology infrastructure and related system operations and assesses potential risks. Develops analytical and reporting tools, feasibility studies, and recommendations for enhancements to the information technology infrastructure and its supporting hardware and software. Implements recovery and backup procedures. Evaluates training requirements for current and new IT solutions, develops appropriate training materials, and provides staff training. Researches and evaluates new technology, techniques, threats and industry best practices to optimize efficiency and usability and minimize vulnerabilities. Prepares and oversees the department budget. Recruits, interviews, hires, trains, develops and evaluates information technology staff. Plans and reviews compensation actions and enforces policies and procedures. May assist staff with diagnosing and solving computer equipment problems.

**IT Administrator Information Technology**

Years of Experience	Base Salaries					Incentive					Total Cash				
	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile
6	78,894	85,896	95,026	104,152	113,207	3,087	3,365	3,717	4,089	4,447	81,981	89,261	98,743	108,241	117,654
5	76,547	83,334	92,197	101,050	109,850	2,978	3,246	3,585	3,945	4,292	79,525	86,580	95,782	104,995	114,142
4	74,175	80,743	89,334	97,908	106,446	2,869	3,127	3,454	3,800	4,136	77,044	83,870	92,788	101,708	110,582
3	71,784	78,132	86,445	94,734	103,005	2,761	3,008	3,324	3,656	3,979	74,545	81,140	89,769	98,390	106,984
2	69,383	75,507	83,540	91,540	99,537	2,652	2,890	3,193	3,512	3,823	72,035	78,397	86,733	95,052	103,360
1	66,977	72,877	80,628	88,334	96,054	2,546	2,773	3,063	3,370	3,668	69,523	75,650	83,691	91,704	99,722

Acquires, implements, modifies and manages hardware, software, and peripheral equipment, such as monitors, keyboards, and printers. Analyzes, detects and corrects minor hardware, software, network and related IT issues. Performs hardware, software and peripheral equipment improvements and upgrades to ensure all systems are up-to-date. Monitors system performance to ensure that operations are within established standards and develops recommendations for enhancements to improve operations and increase system capabilities. Administers IT onboarding of new employees, including collecting requirements, setup, and deployment. Helps customize and adapt existing programs and user interface to meet users' requirements and needs of the business. Maintains inventory of IT equipment, such as desktops, laptops, mobility devices, etc. Creates, organizes and updates documentation of IT processes, policies, licensing and systems. Provides help desk support and specialized technical assistance to system users, escalating issues as necessary. Presents equipment and policy training to staff and end users. Plans, develops and implements recovery and backup procedures. Communicate IT plans, tasks and modifications to relevant

stakeholders and employees. Assists with research and evaluation of new technology, techniques, threats and industry best practices to optimize efficiency and usability and minimize vulnerabilities.

### Systems Analyst Business

Years of Experience	Base Salaries					Incentive					Total Cash				
	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile
6	80,565	87,242	96,031	104,682	113,321	2,928	3,174	3,489	3,816	4,135	83,493	90,416	99,520	108,498	117,456
5	77,658	84,081	92,555	100,895	109,248	2,766	2,998	3,295	3,604	3,906	80,424	87,079	95,850	104,499	113,154
4	74,654	80,811	88,955	96,964	105,012	2,604	2,822	3,101	3,392	3,678	77,258	83,633	92,056	100,356	108,690
3	71,578	77,460	85,258	92,920	100,646	2,443	2,647	2,910	3,184	3,450	74,021	80,107	88,168	96,104	104,096
2	68,457	74,057	81,500	88,802	96,189	2,287	2,476	2,721	2,977	3,227	70,744	76,533	84,221	91,779	99,416
1	65,320	70,635	77,716	84,650	91,687	2,134	2,310	2,537	2,776	3,009	67,454	72,945	80,253	87,426	94,696

Analyzes business processes, functions, and procedures to determine the most effective business systems software to meet the needs of the organization. Establishes systems specifications and objectives, based on business requirements and cost effectiveness, and provides recommendations to management personnel. Collaborates with others in systems development and design, including software programming and table, report, and panel design. Develops test plans and coordinates and performs software testing. Coordinates implementation of the system software, including conversion of data to the new system, and works with application support personnel to resolve system problems. Documents system specifications and notes any changes in procedure. Acts as liaison between systems software development staff, management, and system end-users to determine requirements and obtain sign-off. Provides training and technical support to system end-users.

### Systems Analyst

Years of Experience	Base Salaries					Incentive					Total Cash				
	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile
6	78,783	85,305	93,902	102,363	110,828	2,384	2,584	2,840	3,107	3,367	81,167	87,889	96,742	105,470	114,195
5	75,971	82,245	90,534	98,689	106,872	2,276	2,466	2,711	2,966	3,215	78,247	84,711	93,245	101,655	110,087
4	73,055	79,070	87,035	94,865	102,747	2,166	2,347	2,579	2,821	3,058	75,221	81,417	89,614	97,686	105,805
3	70,063	75,808	83,435	90,923	98,486	2,055	2,227	2,446	2,677	2,901	72,118	78,035	85,881	93,600	101,387
2	67,022	72,492	79,769	86,905	94,132	1,945	2,106	2,314	2,531	2,745	68,967	74,598	82,083	89,436	96,877
1	63,962	69,155	76,077	82,851	89,734	1,836	1,988	2,183	2,387	2,588	65,798	71,143	78,260	85,238	92,322

Analyzes and solves computer problems, and assures technology meets the needs of the organization. Implements system studies to assist organization to realize maximum benefit from investments in equipment, personnel, and business processes. Plans and designs new computer systems or devises ways to apply existing systems resources to additional operations. Analyzes user requirements, procedures, and problems to automate processing or to improve existing computer system. Confers with personnel of organizational units involved to analyze current operational procedures, identify problems, and learn specific input and output requirements, such as forms of data input, how data is to be summarized, and formats for reports. Writes detailed description of user needs, program functions, and steps required to develop or modify computer program. Reviews computer system capabilities, workflow, and scheduling limitations to determine if requested program or program change is possible within existing system. Studies existing information processing systems to evaluate effectiveness, and develops new systems to improve production or workflow as required. Prepares workflow charts and diagrams to specify in detail operations to be performed by equipment and computer programs and operations to be performed by personnel in system. Conducts studies pertaining to development of new information systems to meet current and projected needs. Plans and prepares technical reports, memoranda, and instructional manuals as documentation of program development. Upgrades system and corrects errors to maintain system after implementation. May assist computer programmer in resolution of work problems related to flowcharts, project specifications, or programming. May prepare time and cost estimates for completing projects. May direct and coordinate work of others to develop, test, install, and modify programs. May design new systems, including both hardware and software, or add new software applications to harness more of computer's power.

**IT Analyst**

Years of Experience	Base Salaries					Incentive					Total Cash				
	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile
6	68,492	74,998	83,508	92,142	100,717	2,431	2,667	2,965	3,285	3,594	70,923	77,665	86,473	95,427	104,311
5	66,058	72,309	80,499	88,801	97,069	2,281	2,500	2,779	3,079	3,369	68,339	74,809	83,278	91,880	100,438
4	63,534	69,520	77,374	85,327	93,268	2,132	2,336	2,595	2,875	3,146	65,666	71,856	79,969	88,202	96,414
3	60,940	66,655	74,162	81,751	89,350	1,985	2,175	2,416	2,675	2,927	62,925	68,830	76,578	84,426	92,277
2	58,300	63,742	70,896	78,110	85,355	1,842	2,018	2,240	2,480	2,713	60,142	65,760	73,136	80,590	88,068
1	55,641	60,809	67,610	74,444	81,326	1,703	1,865	2,070	2,290	2,505	57,344	62,674	69,680	76,734	83,831

*Defines, designs, develops, and implements computer applications and solutions that are functional and satisfy both management and end-users, optimize the efficiency of an organization, and are suitable for the organization's work flow and production, using modeling, information engineering, and cost-based accounting. Evaluates present applications used by the organization, and upgrades or enhances existing programs. Conducts surveys to in order to consider user needs, and captures marketing research data. Oversees the implementation of computer solutions by managing Programmers, Coders, and equipment vendors to ensure the design is properly executed in a timely manner and stays within budget. Conducts research on new technologies to provide more efficient support. Defines and enhances computer applications used in the organization, working closely with management in order to know the plans and goals to make immediate developments on the system. Provides support to intranet and Internet maintenance and developments. Ensures that the system is secure and the network is well filtered. Tests and integrates programs. Records procedures and solutions, and writes and stores all the documentations of the existing communication and data systems.*

**Action Required – Effective Pay Period 20, 2022 (September 18, 2022)**

**\* See addendum included in CCFN: 221005 for Salary and Position Ordinance changes.**

Prepared by: Andrea Knickerbocker  
Andrea Knickerbocker, Human Resources Manager

Reviewed by: Harper Donahue  
Harper Donahue, IV, Employee Relations Director



## Department of Employee Relations

**Cavalier Johnson**  
Mayor

**Harper Donahue, IV**  
Director

**Renee Joos**  
Director  
Employee Benefits

**Nicole Fleck**  
Labor Negotiator

### Job Evaluation Report

City Service Commission Meeting: November 15, 2022

#### Employees' Retirement System

Current	Recommended
ERS-Disability Deputy Director PR 1JX (\$82,051 - \$114,879) (One Position)	Employees' Retirement System - Deputy Director PR 1QX (\$127,560 – \$178,577) FN: Minimum Recruitment \$150,520 and may be at any rate upon approval of DER and Chair of F&P. (One Position)
Pension Investment Analyst-Senior PR 2OX (\$87,472 - \$122,465) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. (Three Positions)	ERS Pension Investment Analyst V PR 2TX (\$120,339 - \$168,469) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Three Positions)
New Underfill Title	ERS Pension Investment Analyst IV PR 2SX (\$112,903 - \$158,060) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Underfill Title)
Pension Investment Analyst PR 2MX (\$76,988 - \$107,782) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. (Underfill Title)	ERS Pension Investment Analyst III PR 2RX (\$105,918 - \$148,289) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Underfill Title)
New Underfill Title	ERS Pension Investment Analyst II PR 2QX (\$99,369 - \$139,123) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Underfill Title)



Pension Investment Analyst-Associate PR 2KX (\$67,763 - \$94,870) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. (Underfill Title)	ERS Pension Investment Analyst I PR 2PX (\$93,232 - \$130,521) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Underfill Title)
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Note: Residents receive a rate that is 3% higher.

**Background**

Employee Relations received a request from ERS Executive Director Bernard J. Allen to conduct a job evaluation study of the positions in the Employes' Retirement System. A number of ERS positions have already been approved for reallocation as a part of the business operations and human resources job study heard before the Committee on Finance and Personnel on September 14, 2022. This job evaluation study is the follow up report comprised of additional DER Compensation's recommendations for one leadership position and for the Pension Investment Analysts.

In his request, Mr. Allen notes that on behalf of the Annuity & Pension Board, that pursuant to Chapter 36 of the Milwaukee City Charter, the administration of the ERS resides with the Board and that it is an IRS tax-qualified retirement plan fiduciary with a duty of loyalty to exclusively serve the interest of ERS members and beneficiaries. This fiduciary duty under the Wisconsin law of trusts requires our legal system's highest standard of care.

Mr. Allen further stated that ERS is a City agency by state law under the governance of the Board (and is not a City department.) The ERS is essentially a specialized financial institution, unlike any other City government operations and competes for talent in the financial services employment market. Over many years the realities of the employment markets have created tension for the Board's ability to faithfully operate the pension system in accordance with its fiduciary duty due to previous constraints of the Salary Ordinance. For context, this constraint of the Mayor's salary cap has been lifted by action of legislation approved by the Common Council on September 20, 2022 and subsequently approved by the Mayor.

The Board is obligated to prudently oversee the investment of the approximately \$6 Billion of ERS trust assets, as well as its financial reporting, accounting and information technology systems. Accordingly, the Board must be able to attract and retain competent staff in these disciplines.

To assist DER in conducting this market study, Mr. Allen provided the results of a market survey conducted by the National Council of Public Employee Retirements Systems (NCPERS). NCPERS has approximately 400 member public pension plans.

The timing of this job evaluation study is critical as this fall the Board must determine the City's pension contributions requirements for the next five years. The City pension contribution requirements largely depend upon the Board's confidence level in its ability to attain its long-term expected investment return. The Board's confidence level in turn, depends on the prospects of retaining highly skilled, experienced, and credentialed investment and executive staff in order to do so.

**Position Descriptions and Recommendations**

Current	ERS – Disability Deputy Director	PR 1JX (\$82,051 - \$114,879)	One Position
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Recommended	Employes' Retirement System - Deputy Director	PR 1QX (\$127,560 – \$178,577) FN: Minimum Recruitment \$150,520 and may be at any rate upon approval of DER and Chair of F&P.	One Position
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This position provides vision, leadership, and management of the disability department of the Employes' Retirement System (ERS). The incumbent will develop and implement initiatives that will enhance, improve, and ensure the management of disability applications, re-examinations, and that the general services of the Disability program follow legal requirements within Chapter 36 of the City Charter, as well as state and federal laws. This position has direct managerial oversight of the Disability Specialist Seniors who administer the daily disability operations of the ERS. This position will manage, review and coach, assign tasks, review their performance, and provide annual employment reviews of the Disability Specialist Seniors. This position will coordinate with the Medical Council and Medical Panel in the disposition of applications and re-examinations. The incumbent will be responsible to investigate, analyze and address special situations, reporting these situations to the Executive Director, suggesting solutions to the situations, and changing policies and methods to minimize organizational risk situations. Furthermore, this position will coordinate and facilitate coordination of the Disability program with the City Attorney's Office, Worker's Compensation, and the State Department of Workforce Development. The incumbent will prepare and present reports to the Executive Director regarding the status of applications and re-examinations, as well as the results of litigation. This position will analyze and respond to the impact of changing labor contracts and labor policies, legal interpretations and judicial rulings, and changes in the laws and ordinances that affect the administration of the Disability program. The incumbent will also strive to find solutions to problems, opportunities for improvement, and pursue a global effort to efficiently administer the program. This position will provide management of vendor relationships, administration of vendor contracts, selection of vendors, and coordination with vendors. This position also will act as a fiduciary to the fund. Duties and responsibilities include:

- 50% Supervise Disability Specialist Seniors – positions who administer the daily operations of the ERS; manage, review performance, provide direction, and act as a resource to the Disability Specialist Seniors; provide leadership in handling unusual and difficult circumstances in the daily operations of the administration of the Disability program; and review operations to identify organization risks and address those risks.
- 20% Plans, develops and performs research that analyzes the administration of the Disability program; provides quality assurance; ensures proper procedure in handling applications and re-examinations; finds improvements in processes that will facilitate the efficient processing of applications and re-examinations; reports to the Executive Director and the Annuity and Pension Board; and determines operational challenges, analyzes those challenges, and adapts the administration of the Disability program to meet those challenges.
- 15% Coordinates with vendors, Medical Council and Medical Panel, reviewers and hearing examiners; communicates with retirees, retiree representatives, retiree benefit providers, and other representative organizations.
- 5% Act as liaison with the medical sections of the various other departments in City government.
- 5% Take safety initiatives with the ERS by identifying physical security risks of the facility and staff; and take on a leadership role in providing guidance to management and staff in techniques to reduce safety risks in the workplace.
- 5% Act as a resource to the Executive Director as it relates to HR matters within ERS.

Minimum qualification includes a bachelor's degree in business, economics, public administration or a closely related field from an accredited college or university; and a minimum of seven years of Public Pension experience, including management of a disability program and acting as a fiduciary.

The level of responsibility, impact and accountability, and relationship responsibility of the ERS – Disability Deputy Director is comparable to that of the current Employes' Retirement System - Deputy Director. This report therefore recommends this title be classified as Employes' Retirement System - Deputy Director in Pay Range 1QX.

<b>ERS Pension Investment Analyst V</b>	
Pension Investment Analyst-Senior PR 2OX (\$87,472 - \$122,465) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. (Three Positions)	ERS Pension Investment Analyst V PR 2TX (\$120,339 - \$168,469) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Three Positions)
<p><u>Basic Functions (applies to all levels of Investment Analyst)</u></p> <ul style="list-style-type: none"> <li>Analyze the investment portfolio, portfolio strategy, and potential changes to the strategy. Manage the analysis of individual investment managers and or asset classes such as equity, fixed income, real estate or other. For each investment manager, monitor and examine manager performance, individual holdings, risk level, and guideline compliance. Prepare quantitative analysis with respect to investment related issues. Advise the Chief Investment Officer and assist in answering inquiries and requests of the ERS Board, Investment Committee or other appropriate organizations.</li> <li>Prepares reports for management, the ERS Annuity and Pension Board, and its committees and sub-committees regarding investment matters, investment research results, and special projects.</li> <li>Execute and manage special projects and other duties as assigned.</li> <li>Provide financial analytical support to the payment of fees and the financial accounting and budgeting of investments.</li> </ul>	
<p><u>Education/Experience:</u> <i>(Minimum Requirements have not yet been determined by DER Staffing)</i></p> <ul style="list-style-type: none"> <li>Ten years of progressively responsible experience in analyzing investment and financial information; financial, investment, and quantitative analysis background; and experience in developing and preparing written summary of investment findings.</li> <li>Bachelor's degree in finance, accounting, business or a closely related field of study.</li> </ul> <p><u>Required Competencies for Promotion to ERS Pension Investment Analyst V:</u></p> <ul style="list-style-type: none"> <li>Earned CFA and CAIA designations.</li> <li>Demonstrates mastery of performing Due Diligence functions with respect to investment managers in all of the Fund's asset classes (including Private Equity, Hedge Funds, and Real Assets). Lead responsibilities over lower Investment Analyst Levels 1-IV. Fills in for Deputy CIO when needed.</li> </ul> <p>Primarily a Due Diligence role while making contributions to Reporting, implementation, and special projects that impact Board and Investment Committee presentations and Asset Class Structure analysis. 10% travel.</p>	

<b>ERS Pension Investment Analyst IV</b>	
<i>New Underfill Title</i>	ERS Pension Investment Analyst IV PR 2SX (\$112,903 - \$158,060) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Underfill Title)
<p><u>Education/Experience:</u> <i>(Minimum Requirements have not yet been determined by DER Staffing)</i></p> <ul style="list-style-type: none"> <li>• Five to ten years of progressively responsible experience in analyzing investment and financial information; financial, investment, and quantitative analysis background; and experience in developing and preparing written summary of investment findings.</li> <li>• Bachelor's degree in finance, accounting, business or a closely related field of study.</li> </ul> <p><u>Required Competencies for Promotion to ERS Pension Investment Analyst IV:</u></p> <ul style="list-style-type: none"> <li>• Earned CFA and CAIA designations.</li> <li>• Demonstrates strong ability to independently perform Due Diligence functions with respect to investment managers in all of the Fund's asset classes (including Private Equity, Hedge Funds, and Real Assets). Requires minimal oversight.</li> </ul> <p>Primarily a Due Diligence role while making contributions to Reporting, implementation, and special projects that impact Board and Investment Committee presentations and Asset Class Structure analysis. 10% travel.</p>	

<b>ERS Pension Investment Analyst III</b>	
Pension Investment Analyst PR 2MX (\$76,988 - \$107,782) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board.	ERS Pension Investment Analyst III PR 2RX (\$105,918 - \$148,289) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Underfill Title)
<p><u>Education/Experience:</u> <i>(Minimum Requirements have not yet been determined by DER Staffing)</i></p> <ul style="list-style-type: none"> <li>• Three to five years of progressively responsible experience in analyzing investment and financial information; financial, investment, and quantitative analysis background; and experience in developing and preparing written summary of investment findings.</li> <li>• Bachelor's degree in finance, accounting, business or a closely related field of study.</li> </ul> <p><u>Required Competencies for Promotion to ERS Pension Investment Analyst III:</u></p> <ul style="list-style-type: none"> <li>• Passed Level I and Level II of the Chartered Financial Analyst (CFA) program and makes continued progress toward earning the CFA designation.</li> </ul> <p>Requires minimal oversight. Primarily Due Diligence role while still making meaningful contributions to Reporting, implementation, and special projects as needed. 10% travel</p>	

<b>ERS Pension Investment Analyst II</b>	
<i>New Underfill Title</i>	ERS Pension Investment Analyst II PR 2QX (\$99,369 - \$139,123) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Underfill Title)

**Education/Experience:** *(Minimum Requirements have not yet been determined by DER Staffing)*

- Two to three years of progressively responsible experience in analyzing investment and financial information; financial, investment, and quantitative analysis background; and experience in developing and preparing written summary of investment findings.
- Bachelor's degree in finance, accounting, business or a closely related field of study.

**Required Competencies for Promotion to ERS Pension Investment Analyst II:**

- Passed Level 1 of the Chartered Financial Analyst (CFA) program and makes continued progress toward earning the CFA designation.

Requires moderate oversight; Primarily Reporting, with meaningful implementation and Due Diligence support, and special projects. 5%-10% travel.

**ERS Pension Investment Analyst I**

Pension Investment Analyst-Associate PR 2KX (\$67,763 - \$94,870) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. (Underfill Title)	ERS Pension Investment Analyst I PR 2PX (\$93,232 - \$130,521) FN: Appointment may be at any rate upon approval of ERS Director and the Annuity and Pension Board. FN: Annual performance-based increases upon approval of the ERS Director and the Annuity and Pension Board. (Underfill Title)
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**Education/Experience:** *(Minimum Requirements have not yet been determined by DER Staffing)*

- One year of experience in analyzing investment and financial information; financial, investment, and quantitative analysis background preferred; and experience in developing and preparing written summary of investment findings.
- Bachelor's degree in finance, accounting, business or a closely related field of study.
- College Seniors with relevant internship and bachelor's degree can be considered.

**Required Competencies for ERS Pension Investment Analyst I:**

- Expected to enroll and make progress in the Chartered Financial Analyst (CFA) program.

Requires significant oversight; Primarily Reporting, with meaningful implementation and Due Diligence support, and special projects. 5%-10% travel.

**Cost of Labor Considerations**

In determining the rates of pay recommended in the above chart, this report takes into consideration the cost of labor as reported by the Economic Resource Institutes, a salary survey to which DER subscribes as well as the pay data reported by the 2022 National Council of Public Employee Retirement Systems (NCPERS) Compensation Study.

ERI Market Data 10/18/2022

**Investment Strategist**

All Incumbents	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile
Level 1	89,819.00	97,329.00	107,030.00	116,802.00	126,425.00	4,691	5,067	5,540	6,034	6,505	94,510	102,397	112,570	122,836	132,930
Level 2	103,402.00	112,098.00	123,280.00	134,581.00	145,630.00	6,377	6,889	7,528	8,195	8,827	109,778	118,988	130,808	142,776	154,457
Level 3	121,763.00	132,049.00	145,198.00	158,441.00	171,362.00	8,804	9,510	10,384	11,287	12,144	130,567	141,559	155,582	169,729	183,506
	Base Salaries					Incentive					Total Cash				
Years of Experience	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile	10th Percentile	25th Percentile	Mean	75th Percentile	90th Percentile
7	106,282.00	115,234.00	126,735.00	138,371.00	149,748.00	6,681	7,217	7,888	8,586	9,248	112,963	122,451	134,623	146,957	158,996
6	102,832.00	111,484.00	122,613.00	133,866.00	144,893.00	6,216	6,716	7,341	7,993	8,612	109,048	118,200	129,954	141,859	153,505
5	99,295.00	107,639.00	118,385.00	129,242.00	139,901.00	5,760	6,224	6,803	7,409	7,986	105,055	113,863	125,188	136,651	147,887
4	95,690.00	103,720.00	114,073.00	124,524.00	134,801.00	5,315	5,742	6,277	6,837	7,371	101,005	109,462	120,350	131,361	142,172
3	92,041.00	99,750.00	109,703.00	119,740.00	129,626.00	4,880	5,274	5,766	6,281	6,773	96,921	105,024	115,469	126,021	136,399
2	88,372.00	95,758.00	105,308.00	114,925.00	124,413.00	4,460	4,820	5,269	5,741	6,192	92,832	100,578	110,577	120,666	130,605
1	84,710.00	91,774.00	100,918.00	110,114.00	119,201.00	4,057	4,382	4,792	5,221	5,632	88,767	96,156	105,710	115,335	124,833

*Investment Strategist: Manages the investment strategies for an organization's investment assets, such as real estate holdings, fixed income, and equity securities. Develops overall investment goals and strategies, and implements work processes. Collaborates with other investment personnel. Analyzes the performance of a variety of investments, such as mutual funds, stocks, and bonds. Utilizes knowledge of fiduciary principles, regulatory legislation, market environments, and market trends that could impact the organization's investments. Develops investment solutions and an investment offering list for clients.*

### **Analysis and Recommendation**

This report provides pay recommendations for leadership and investment positions in the Employees' Retirement System which are under the governance of the Annuity & Pension Board. Recommendations take into consideration the cost of labor in southeastern Wisconsin via market data from ERI, as well as the results of the survey conducted by NCPERS.

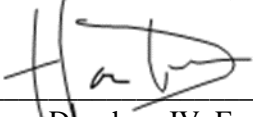
Furthermore, this report recommends the ability for the Annuity and Pension Board to conduct performance reviews and provide annual performance-based increases for key investment positions in the ERS.

A follow-up report that addresses the additional positions in the ERS will be presented before the City Services Commission and the Finance and Personnel Committee at a later date.

### **Action Required – Effective Pay Period 24, 2022 (November 13, 2022)**

**\* See addendum included in CCFN: 221005 for Salary and Position Ordinance changes.**

Prepared by: Andrea Knickerbocker  
Andrea Knickerbocker, Human Resources Manager

Reviewed by:   
Harper Donahue, IV, Employee Relations Director



## Department of Employee Relations

**Cavalier Johnson**  
Mayor

**Vacant**  
Director

**Renee Joos**  
Employee Benefits  
Director

**Nicole M. Fleck**  
Labor Negotiator

### Job Evaluation Report

City Service Commission Meeting: November 15, 2022

#### Health Department

Current	Recommended
New Position	Program Assistant III PR 5IN (\$47,274 - \$55,763) FN: Recruitment at \$48,735 (One Position)
New Position	Program Assistant III PR 5IN (\$47,274 - \$55,763) FN: Recruitment at \$48,735 (One Position)

The Milwaukee Health Department (MHD) submitted a request to classify two new positions. Both positions were created through the American Rescue Plan Act (ARPA). One position will assist with tracking for purchases under ARPA and the other position will assist with hiring and staffing of the ARPA positions in the Health Department.

Current	New Position		One Position
Recommended	Program Assistant III	PR 5IN (\$47,274 - \$55,763) FN: Recruitment at \$48,735	One Position

This position will manage key business processes related to MHD’s grant-funded activities, specifically programs funded by ARPA; manage the creation, documentation, and reporting/payment processes for \$49 million in ARPA subawards, of which MHD is projected to have over two dozen; and work on procurement processing and documentation for ARPA funded purchases, and financial reporting and basic bookkeeping for ARPA expenses. Duties and responsibilities include:

- 40% Manage grant files, subaward agreements, compliance documentation, and procurement files and information related to MHD’s ARPA funded programs.
- 25% Review and validate cost reports and payments for ARPA funded programs managed by MHD, and compile and report data and financial information on MHD’s use of ARPA funding.
- 10% Compile, validate, and maintain MHD subaward documents with program partners.
- 10% Publish regular reports on MHD’s ARPA funded programs for MHD leadership, program managers, and City partners; generate financial reporting information for non-City ARPA awards; and coordinate approval and delivery of ARPA financial reports.
- 5% Process payment vouchers, account code creation, and other bookkeeping transactions for MHD’s ARPA projects.
- 5% Perform other duties as assigned for ARPA funded work and MHD’s ARPA funded programs.

- 5% Participate in various human resources projects; serve on MHD committees, such as wellness or safety, as needed; and perform other duties as assigned including responding to an emergency or broad impact event

Minimum requirements include five years of experience in providing administrative support including handling sensitive information, creating and managing legal or compliance documents, or managing complex administrative processes.

The responsibilities of this new position are comparable in nature of work and level of responsibility to other Program Assistant III positions in Pay Range 5IN (\$47,274 - \$55,763) with a recruitment rate of \$48,735. Program Assistant III positions are the highest level of the Program Assistant job series. These positions perform a variety of office and administrative work in support of a distinct area of operations within a city department and their work supports a significantly complex program or area of operation. In addition to requiring the equivalent knowledge and skill normally obtained with a bachelor’s degree, these positions require an extensive knowledge of technical and/or administrative information.

We therefore recommend this new position be classified as a Program Assistant III in Pay Range 5IN (\$47,274 - \$55,763) with a recruitment rate of \$48,735.

Current	New Positions		One Position
Recommended	Program Assistant III	PR 5IN (\$47,274 - \$55,763) FN: Recruitment at \$48,735	One Position

This position will provide confidential administrative support to the Human Resources (HR) team; may assist with HR investigations, payroll, compliance audits, employment verifications, unemployment claim submissions, HR system audits, recruiting, hiring, and maintenance of confidential records. Duties and responsibilities include:

- 50% provide confidential administrative support to the HR team including notetaking during investigations and disciplinary meetings and creation and maintenance of documentation; respond to employment verifications and maintain a record of verifications completed; and maintain employee files including employment, injury, and medical files.
- 25% Support the new employee orientation process; prepare new employee orientation materials; ensure the hiring check list is completed upon hire; order name plates, security badges, and parking cards; prepare probationary report form and send reminder to hiring manager; and update organizational chart.
- 10% Complete annual compliance audits such as nursing licensure.
- 5% Serve as backup to the Health Payroll Specialist including support of the contract staff payroll review and hiring.
- 5% Serve as the primary reviewer for MHDHR email box; and respond to employee and manager questions regarding various HR related topics.
- 5% Assist the Human Resources Analyst with updating and maintaining the MHD HR intranet; participate in various human resources projects; serve on MHD committees, such as wellness or safety, as needed; and perform other duties as assigned including responding to an emergency or broad impact event

Minimum requirements include five years of experience in providing administrative support including two years of handling confidential information.

The responsibilities of this new position are also comparable in nature of work and level of responsibility to other Program Assistant III positions in Pay Range 5IN (\$47,274 - \$55,763) with a recruitment rate of \$48,735 including the position listed above.



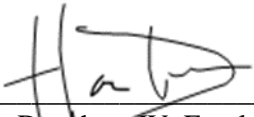
We therefore recommend this new position be classified as a Program Assistant III in Pay Range 5IN (\$47,274 - \$55,763) with a recruitment rate of \$48,735.

**Action Required – Effective Pay Period 24, 2022 (November 13, 2022)**

**\* See addendum included in CCFN: 221005 for Salary and Position Ordinance changes.**

Prepared by:           Sarah Trotter            
Sarah Trotter, Human Resources Representative

Reviewed by:           Andrea Knickerbocker            
Andrea Knickerbocker, Human Resources Manager

Reviewed by:   
Harper Donahue, IV, Employee Relations Director



# City of Milwaukee Fiscal Impact Statement

<b>A</b>	<b>Date</b>	<u>11/13/2022</u>	<b>File Number</b>	<u>221005</u>	<input type="checkbox"/> Original	<input checked="" type="checkbox"/> Substitute
	<b>Subject</b>	Communication from the Department of Employee Relations regarding the costs of classification reports scheduled for the City Service Commission on November 15, 2022.				

<b>B</b>	<b>Submitted By (Name/Title/Dept./Ext.)</b>	<u>Sarah Trotter/ Human Resources Representative / Employee Relations / x2398</u>
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<b>C</b>	<b>This File</b>	<input checked="" type="checkbox"/> Increases or decreases previously authorized expenditures.
		<input type="checkbox"/> Suspends expenditure authority.
		<input type="checkbox"/> Increases or decreases city services.
		<input type="checkbox"/> Authorizes a department to administer a program affecting the city's fiscal liability.
		<input type="checkbox"/> Increases or decreases revenue.
		<input checked="" type="checkbox"/> Requests an amendment to the salary or positions ordinance.
		<input type="checkbox"/> Authorizes borrowing and related debt service.
		<input type="checkbox"/> Authorizes contingent borrowing (authority only).
		<input type="checkbox"/> Authorizes the expenditure of funds not authorized in adopted City Budget.

<b>D</b>	<b>Charge To</b>	<input checked="" type="checkbox"/> Department Account	<input type="checkbox"/> Contingent Fund
		<input type="checkbox"/> Capital Projects Fund	<input type="checkbox"/> Special Purpose Accounts
		<input type="checkbox"/> Debt Service	<input checked="" type="checkbox"/> Grant & Aid Accounts
		<input type="checkbox"/> Other (Specify) _____	

Purpose	Specify Type/Use	Expenditure	Revenue
Salaries/Wages		\$0.00	\$0.00
		\$0.00	\$0.00
Supplies/Materials		\$0.00	\$0.00
		\$0.00	\$0.00
Equipment		\$0.00	\$0.00
		\$0.00	\$0.00
Services		\$0.00	\$0.00
		\$0.00	\$0.00
Other		\$0.00	\$0.00
		\$0.00	\$0.00
<b>TOTALS</b>		<b>\$ 0.00</b>	<b>\$ 0.00</b>

**F****Assumptions used in arriving at fiscal estimate.** Please see attached spreadsheet. \_\_\_\_\_**G****For expenditures and revenues which will occur on an annual basis over several years check the appropriate box below and then list each item and dollar amount separately.** 1-3 Years       3-5 Years 1-3 Years       3-5 Years 1-3 Years       3-5 Years

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**H****List any costs not included in Sections D and E above.** \_\_\_\_\_**I****Additional information.** \_\_\_\_\_**J****This Note**     **Was requested by committee chair.**

**Department of Employee Relations  
Fiscal Note Spreadsheet (Revised November 13, 2022)**

City Service Commission Meeting of November 15, 2022  
Finance and Personnel Committee Meeting of November 15, 2022

NEW COSTS FOR 2022										
Pos.	Dept	From	PR	To	PR	Annual	Annual	Costs	Rollup	Rollup+ Sal
1	Common Council-City Clerk	Document Services Manager	1DX	Document Services Manager	1DX	\$65,803	\$69,464	\$422	\$59	\$482
1	Common Council-City Clerk	Document Services Supervisor	2CN	Document Services Supervisor	2CN	N/A	N/A	N/A Above New Recruitment Rate		
1	Common Council-City Clerk	Document Services Supervisor	2CN	Document Services Supervisor	2CN	\$50,249	\$50,954	\$81	\$17	\$98
1	Employees' Retirement Sys	Program Assistant II	5FN	Records Services Supervisor	2CN	\$43,390	\$49,470	\$702	\$143	\$845
1	Common Council-City Clerk	Document Technician	3CN	Document Technician I	3EN	\$40,941	\$42,988	\$236	\$48	\$284
1	Common Council-City Clerk	Document Technician	3CN	Document Technician I	3EN	\$39,749	\$41,737	\$229	\$47	\$276
2	Common Council-City Clerk	Document Technician	3CN	Document Technician I	3EN	\$39,352	\$41,319	\$454	\$93	\$547
1	Common Council-City Clerk	Document Technician	3CN	Document Technician I	3EN	\$38,205	\$40,116	\$221	\$45	\$266
1	Employees' Retirement Sys	Records Technician II	6EN	Records Technician II	3FN	\$36,641	\$39,278	\$304	\$62	\$447
1	Employees' Retirement Sys	Records Technician II	6EN	Records Technician II	3FN	\$34,418	\$40,457	\$697	\$142	\$1,218
1	Comptroller's Office	Functional Applications Manager	1IX	Functional Applications Manager*	1JX	\$87,097	\$100,920	\$3,722	\$521	\$4,243
1	Comptroller's Office	FMIS Project Manager	2LX	FMIS Project Manager*	2MX	\$74,411	\$97,290	\$6,160	\$862	\$7,022
1	Comptroller's Office	Functional Applications Analyst-Senior	2JX	Functional Applications Analyst-Senior*	2KX	N/A	N/A	N/A Above New Recruitment Rate		
1	Comptroller's Office	Comptroller Network Administrator	2IX	Comptroller Network Administrator*	2JX	\$59,632	\$69,943	\$2,776	\$389	\$3,165
1	Comptroller's Office	Financial Systems Analyst	2GX	Financial Systems Analyst*	2JX	\$52,498	\$69,943	\$4,697	\$658	\$5,354
1	Employees' Retirement Sys	ERS-Disability Deputy Director	1JX	Employees' Retirement System-Dep Dir	1QX	\$84,512	\$155,036	\$8,137	\$1,139	\$9,277
1	Employees' Retirement Sys	Pension Investment Analyst-Senior	2OX	ERS Pension Investment Analyst V	2TX	N/A	N/A	N/A Above New Recruitment Rate		
1	Employees' Retirement Sys	Pension Investment Analyst	2MX	ERS Pension Investment Analyst III	2RX	\$100,443	\$105,918	\$632	\$88	\$720
1	Employees' Retirement Sys	Pension Investment Analyst-Associate	2KX	ERS Pension Investment Analyst I	2PX	\$67,763	\$93,232	\$2,939	\$411	\$3,350
2	Health	New Positions	N/A	Program Assistant III	5IN	N/A	N/A	N/A Grant Funded Positions		
22								\$32,408	\$4,726	\$37,134

Assume effective date is Pay Period 24, 2022 (November 13, 2022) unless otherwise indicated.

\*Assume effective date is Pay Period 20, 2022 (September 18, 2022).

NEW COSTS FOR FULL YEAR										
Pos.	Dept	From	PR	To	PR	Annual	Annual	Costs	Rollup	Rollup+ Sal
1	Common Council-City Clerk	Document Services Manager	1DX	Document Services Manager	1DX	\$65,803	\$69,464	\$3,661	\$513	\$4,174
1	Common Council-City Clerk	Document Services Supervisor	2CN	Document Services Supervisor	2CN	N/A	N/A	N/A Above New Recruitment Rate		
1	Common Council-City Clerk	Document Services Supervisor	2CN	Document Services Supervisor	2CN	\$50,249	\$50,954	\$705	\$144	\$849
1	Employees' Retirement Sys	Program Assistant II	5FN	Records Services Supervisor	2CN	\$43,390	\$49,470	\$6,080	\$1,243	\$7,323
1	Common Council-City Clerk	Document Technician	3CN	Document Technician I	3EN	\$40,941	\$42,988	\$2,047	\$419	\$2,466
1	Common Council-City Clerk	Document Technician	3CN	Document Technician I	3EN	\$39,749	\$41,737	\$1,988	\$407	\$2,395
2	Common Council-City Clerk	Document Technician	3CN	Document Technician I	3EN	\$39,352	\$41,319	\$3,934	\$805	\$4,739
1	Common Council-City Clerk	Document Technician	3CN	Document Technician I	3EN	\$38,205	\$40,116	\$1,911	\$391	\$2,302
1	Employees' Retirement Sys	Records Technician II	6EN	Records Technician II	3FN	\$36,641	\$39,278	\$2,637	\$539	\$3,872
1	Employees' Retirement Sys	Records Technician II	6EN	Records Technician II	3FN	\$34,418	\$40,457	\$6,039	\$1,235	\$7,974
1	Comptroller's Office	Functional Applications Manager	1IX	Functional Applications Manager*	1JX	\$87,097	\$100,920	\$13,823	\$1,935	\$15,758
1	Comptroller's Office	FMIS Project Manager	2LX	FMIS Project Manager*	2MX	\$74,411	\$97,290	\$22,879	\$3,203	\$26,082
1	Comptroller's Office	Functional Applications Analyst-Senior	2JX	Functional Applications Analyst-Senior*	2KX	N/A	N/A	N/A Above New Recruitment Rate		
1	Comptroller's Office	Comptroller Network Administrator	2IX	Comptroller Network Administrator*	2JX	\$59,632	\$69,943	\$10,311	\$1,444	\$11,755
1	Comptroller's Office	Financial Systems Analyst	2GX	Financial Systems Analyst*	2JX	\$52,498	\$69,943	\$17,445	\$2,442	\$19,887
1	Employees' Retirement Sys	ERS-Disability Deputy Director	1JX	Employees' Retirement System-Dep Dir	1QX	\$84,512	\$155,036	\$70,524	\$9,873	\$80,397

1	Employes' Retirement Sys	Pension Investment Analyst-Senior	2OX	ERS Pension Investment Analyst V	2TX	N/A	N/A	N/A Above New Recruitment Rate			
1	Employes' Retirement Sys	Pension Investment Analyst	2MX	ERS Pension Investment Analyst III	2RX	\$100,443	\$105,918	\$5,475	\$767	\$6,242	
1	Employes' Retirement Sys	Pension Investment Analyst-Associate	2KX	ERS Pension Investment Analyst I	2PX	\$67,763	\$93,232	\$25,469	\$3,566	\$29,035	
2	Health	New Positions	N/A	Program Assistant III	5IN	N/A	N/A	N/A Grant Funded Positions			
22								\$194,928	\$28,924	\$223,852	

Note: Total may not be to the exact dollar due to rounding.