



Department of Employee Relations

Marvin E. Pratt
Mayor

Florence Dukes
Director

David Heard
Fire and Police Commission
Executive Director

Michael Brady
Employee Benefits Director

March 19, 2004

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

Dear Committee Members: Re: Common Council File Number 031629

The following classification was approved by the Board of Fire and Police Commissioners on March 18, 2004:

In the Fire Department, one new position was classified as Business Finance Manager, Salary Grade 009.

The job evaluation report containing the necessary Positions Ordinance amendment is attached.

Sincerely,

Florence H. Dukes
Employee Relations Director

FHD:pb

Attachments: Job Evaluation Report
 Fiscal Note

c: Chief William Wentlandt
 Deputy Chief Andrew Smerz
 Mary McDougall

JOB EVALUATION REPORT

Fire and Police Commission Meeting Date: March 18, 2004

Incumbent: New Position

Department: Fire

Present	Request
Title: n/a	Title: Business Operations Manager
Pay Range: n/a	Pay Range: 008 (\$52,377 - \$73,325)
Step: n/a	Source: Department
Recommendation: Title : Business Finance Manager Salary: 009 (\$55,849 - \$78,186) New Rate: n/a	
Rationale: The duties and responsibilities of this position compare most favorably with other Business Operations Manager positions in larger City departments that are classified in Salary Grade 009. Since the focus of the work is more financial in nature we recommend the title of Business Finance Manager.	
History of Position: This is a new position in the 2004 budget.	

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

In the 2004 Positions Ordinance, under Fire Department, Supporting Services Decision Unit, delete one position of Business Operations Manager and add one position of Business Finance Manager.

Background:

On December 9, 2003, the Department of Employee Relations was asked to study this new position in the Fire Department for proper classification. In evaluating this request, discussions were held with Andrew Smerz, Deputy Chief, Fire and Mary McDougall, Fire Personnel Officer.

Duties and Responsibilities:

A summary of duties and responsibilities as described in the job description is shown below:

- 20% Develops and administers budget policy and procedures. Conducts budget research by auditing historical performance and analyzing future opportunities through planning. Works in concert with Management and Accounting Officer to develop annual budget request. Coordinates and monitors budget performance and analyzes spending. Develops department budget and fiscal presentations. May represent department on fiscal issues.
- 20% Responsible for budget and fiscal policy development. Develops department, program and performance measures and appropriately relates measures to organizational strategic plan. Assists in development of strategic plan.
- 20% Develops and prepares applications for grants to finance programs as required. Negotiates legislative process including establishment of grant accounts. Drafts resolutions related to grants, and develops grant budget and grant summary documents.

- 20% Provides budget research and planning. Performs analysis of fire department budgets from similar communities. Proposes, researches, and develops innovative management concepts and best practices. Conducts studies at the request of the Chief to identify appropriate resource allocations, outsourcing, and accounting methods, which would result in a savings to the department. Identifies opportunities to improve productivity, performance, and cost savings.
- 5% Periodically conducts internal audit functions at request of the Chief. Conducts evaluation of efficiency and effectiveness of department initiatives.
- 10% Develops and forecasts capital budget. Acts as liaison on all capital projects, including evaluating proposals, monitoring progress, and reporting expenditures. Conducts research to determine appropriate investment of capital items, including apparatus and buildings.
- 5% Provides resources to the Chief to evaluate service opportunities to other communities such as dispatching, training, apparatus and equipment repair, and fire protection and emergency medical services.

Based on the job description provided by the department, this position requires a Bachelor's Degree in Business Administration, Accounting, Finance, or related field, and five years of progressively responsible professional experience in budget or financial management or policy/productivity analysis. Strong written and oral communications skills, analytical and research skills are also required. Must be able to prepare and defend the budget and manage financial activities of a major City department. Personal computer and other technical systems knowledge are necessary. Governmental budgeting, policy/productivity analysis and supervisory experience is highly desirable. CPA designation is also desirable.

Analysis:

This new position will manage and oversee all aspects of the Fire Department's financial operations, including both O&M and Capital budgets. As such, this position will be responsible for crucial activities such as budget and fiscal analysis, budget policy and strategy development, budget-related research and planning, and developing and implementing cost control functions. For example, this position would be involved in costing and analyzing the financial implications of contracts such as the contract with Milwaukee County for the paramedic program and contracts involving the provision of services to other agencies.

This position will also be responsible for developing and preparing grant applications, coordinating the implementation and administration of the grants and all grant-related budgeting and financial requirements. At the direction of the Chief, this position will also conduct internal audits, and productivity and other studies in order to identify productivity, performance and cost savings. This position will develop budget and fiscal presentations and may represent the department on fiscal issues.

The department has requested that this position be classified as Business Operations Manager in Salary Grade (SG) 008. A review of other City departments reveals some variety in the title and level of the positions performing business operations functions. This is to be expected given the differences in size, complexity and function of City departments, as well as how the department head chooses to assign these functions within the department. The Business Operations Manager classification in SG 008 is considered the standard classification for this function, though larger departments such as the Library and Health Department have their business operations manager position in SG 009. The two largest departments in the City, Department of Public Works (DPW) and the Police Department, have their budget and financial manager position in SG 011.

March 18, 2004

In determining the recommended classification of this position, comparisons were made with other departments in the City. Factors considered included size and complexity of the department, size of operating and capital budgets, and overall scope of responsibility. This analysis indicated that this position should be at a higher level than Business Operations Manager in SG 008 but not as high as the positions in DPW and the Police Department. While the Fire Department is the third largest department in the City, it is less than half the size of DPW and the Police Department. Also, the Fire Department's combined operating and capital budget is approximately half of those two departments.

We recommend that this position be classified in SG 009 as are the business operations manager positions in the Health Department and Library. While these are smaller departments than the Fire Department, this is offset by the wider scope of responsibility of the business manager positions as well as the complexity of the departments. For example, the Fire Department has 1,151 positions in approximately 46 different job classifications. Firefighter and Heavy Equipment Operator account for approximately two-thirds of the department's personnel. The Health Department, on the other hand, has 359 positions and 107 different job classifications and a wide variety of functional areas. They also administer approximately \$17 million in grants. The Library has 409 positions in approximately 62 different classifications.

The focus of the work for this new position is more financial in nature so we recommend the existing title of Business Finance Manager. Since this is a new position, it is possible that the position's scope and level of responsibility may grow over time. Therefore it may be necessary to evaluate the position again after it has been functioning for a substantial period of time.

Recommendation:

Based on the above analysis, we recommend that this position be classified in Salary Grade 009 with a title of Business Finance Manager and be given the following profile on the City's management pay plan job evaluation factors:

	<u>Level</u>	<u>Points</u>
Impact and Accountability	10	158
Knowledge and Skills	8	111
Reporting Relationships	6	38
Working Conditions	1	05
TOTAL		312

Salary Grade 009: 306-351

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

Reviewed by: Florence Dukes
Florence Dukes, Employee Relations Director

CITY OF MILWAUKEE FISCAL NOTE

A) Date: March 19, 2004

File Number: 031629
Orig Fiscal Note Substitute

Subject: New position classification approved by the Fire and Police Commission on March 18, 2004

B) Submitted By (name/title/dept/ext.): Sarah Trotter, Human Resources Representative/Dept. of Employee Relations/X2398

C) Check One: Adoption of this file authorizes expenditures
 Adoption of this file does not authorize expenditures; further Common Council action needed. List anticipated costs in Section G below.
 Not applicable / no fiscal impact. (New position in 2004 budget.)

D) Charge to: Departmental Account (DA) Contingent Fund (CF)
 Capital Projects Fund (CPF) Special Purpose Accounts (SPA)
 Perm. Improvement Funds (PIF) Grant & Aid Accounts (G & AA)
 Other (Specify)

E) Purpose	Specify Type/Use	Account	Expenditure	Revenue	Savings
Salaries/Wages:	Classification of one new position of Business Finance Manager in the Fire Department. <i>(See attached spreadsheet for details)</i>		<i>(See attached spreadsheet)</i>		
Supplies:					
Materials:					
New Equip:					
Equip Repair:					
Rollups (.2045):					
Totals					

F) 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**.

<input type="checkbox"/> 1-3 Years	<input type="checkbox"/> 3-5 Years	
<input type="checkbox"/> 1-3 Years	<input type="checkbox"/> 3-5 Years	
<input type="checkbox"/> 1-3 Years	<input type="checkbox"/> 3-5 Years	

G) List any anticipated future costs this project will require for completion:

H) Computations used in arriving at fiscal estimate:

(See attached spreadsheet for details)

Please list any comments on reverse side or attachment and check here *(See attached)*

Department of Employee Relations

Fiscal Note Spreadsheet

Finance & Personnel Committee Meeting of March 31, 2004
 Fire and Police Commission Meeting of March 18, 2004

NEW COSTS FOR 2004										
No.	Dept	From	PR/SG	To	PR/SG	Present Annual	New Annual	New Savings	Rollup	Total Rollup+ Sal
1	Fire	New Position	N/A	Business Finance Manager	9	N/A	N/A	N/A	N/A	N/A Included in 2004 Budget

Assume change is effective Pay Period 1 (December 21, 2004)

PROJECTED NEW COSTS FOR FULL YEAR

No.	Dept	From	PR/SG	To	PR/SG	Present Annual	New Annual	New Savings	Rollup	Total Rollup+ Sal
1	Fire	New Position	N/A	Business Finance Manager	9	N/A	N/A	N/A	N/A	N/A Included in 2004 Budget