



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 12, 2004

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

Dear Committee Members: Re: Common Council File Number 031440

The following classification and pay recommendations will be submitted to the City Service Commission for consideration on March 16, 2004. We recommend these classification and pay levels, subject to approval by the City Service Commission:

In the Assessor's Office four positions of Supervising Assessor Assistant, Salary Grade 007, are recommended for reallocation to Salary Grade 009; and one position of Supervising Assessor, Salary Grade 009, is recommended for reallocation to Salary Grade 011.

In the Health Department, one new position is recommended for classification as Laboratory Operations Manager, Salary Grade 007; and one position of Laboratory Information Systems Coordinator, Pay Range 644, is recommended for reclassification to Laboratory Information Systems Specialist, Pay Range 646.

Various classification and compensation levels are recommended for eight positions (three new positions and five reclassifications) in the Department of Employee Relations.

The necessary Salary and Positions Ordinance amendments, are included in the attached reports.

Sincerely,

Florence H. Dukes
Employee Relations Director

FHD:pb

Attachments: 3 Job Evaluation Reports
 Fiscal Note

C: Sally McAttee, Joseph Czarnetzki, Erick Shambarger, Mary Reavey, Peter Weissenfluh, Jerome Gellert, Ralph Kuba, John Meyer, Mary Watson, Scott Winter, Dr. Seth Foldy, Maria Monteagudo, Michelle Stein, Dr. Steven Gradus, Mark Zemke, Burma Hudson, Delores Kubasa, Kathleen Weege, Tony Leskovar, Steve Smith, Cassandra Scherer, Jane French and Cynthia Nowak

200 East Wells Street, Room 706, Milwaukee, WI 53202, Phone (414) 286-3751, FAX 286-0800, TDD 286-2960
Employee Benefits and Labor Relations – Room 701 • Labor Relations Phone (414) 286-2356, Fax 286-0900
Medical Benefits Phone (414) 286-3184 • Worker's Compensation (414) 286-2020, Fax 286-2106

JOB EVALUATION REPORT

City Service Commission Meeting Date: March 16, 2004

- (A) Ralph Kuba
- (B) John Meyer
- (C) Mary Watson
- (D) Scott Winter

Incumbents: (E) Jerome Gellert

Department: Assessor's Office

Present	Request
Title: (A)-(D) Supervising Assessor Assistant (E) Supervising Assessor	Title: (A)-(D) Supervising Assessor Assistant (E) Supervising Assessor
Salary: (A)-(D) SG 007 (\$46,785 - \$65,496) (E) SG 009 (\$53,158 - \$74,419)	Salary: (A)-(D) SG 010 (\$56,651 - \$79,313) (E) SG 012 (\$64,363 - \$90,108)
Current Rate: (A)-(D) \$65,496 (E) \$74,419	Source: Department
<p>Recommendation:</p> <p>Title: Supervising Assessor Assistant Salary: Salary Grade 009 (\$53,158 - \$74,419) New Rate: (A)-(D) \$67,891</p> <p>Title: Supervising Assessor Salary: Salary Grade 011 (\$60,397 - \$84,553) New Rate: (E) \$77,137</p> <p>Note: All rates listed above are 2002 rates.</p>	
<p>Rationale: As a result of a reorganization in the Assessor's Office the supervisors in the Assessment Division became responsible for supervising a team of Property Appraisers who assess all types of property. Previously, they had supervised staff who assessed one type of property such as personal property or residential property. This change increased the level of responsibility and knowledge needed for their expanded positions. Further, a pay compression problem developed between the Supervising Assessor Assistants and the Senior Property Appraisers. This recommended higher level will reflect the increase in responsibility and knowledge needed for the Supervisory positions and will eliminate the compression problem with the positions they supervise.</p>	
<p>History of Position: These positions were last studied as part of the Management Pay Plan Study in 1987. At that time the pay range for Supervising Assessor changed from Pay Range 118 to Salary Grade 009 and the Assistant Supervising Assessor positions in Pay Range 116 were reclassified to Supervising Assessor Assistant in Salary Grade 007.</p>	

Action Required:

In the Salary Ordinance, under Salary Grade 007, delete the title "Supervising Assessor Assistant". Under Salary Grade 009, add the title "Supervising Assessor Assistant" and delete the title of "Supervising Assessor". Under Salary Grade 011, add the title "Supervising Assessor".

Background:

The Department of Employee Relations received a request to study these supervisory positions originally on March 25, 2003. A decision was made to hold the study until after the 2004 budget process when one of the Supervising Assessor Assistant positions was eliminated. Questionnaires were completed by the incumbents and job audits were conducted with Jerome Gellert, Supervising Assessor and Scott Winter, Supervising Assessor Assistant. Discussions were also held with Mary Reavey, Commissioner of Assessments and Peter Weissenfluh, Chief Assessor.

Supervising Assessor Assistant

The basic function of these four positions is to administer the City's assessment program in a manner that assures public confidence in the department's accuracy, productivity, and fairness. The duties and responsibilities are as follows:

- 25% Supervise the discovery, listing and uniform valuation of all taxable property in the City of Milwaukee.
- 20% Maintain and motivate an effective work team through selection, training, coaching, planning and supervising to obtain department goals and objectives.
- 20% Supervise and contribute to the production of an annual assessment roll. This includes serving as a member of the Board of Assessors and insuring that the staff is informed of and complies with the laws related to assessment.
- 15% Process assessment appeals as required by assessment law.
- 10% Provide service and information to the public, other city departments, and public agencies. This includes representing the Department at neighborhood meetings, professional organizations and other speaking opportunities; and meeting with taxpayers, accountants, attorneys, taxpayer representatives and private appraisers.
- 5% Research and recommend action regarding the eligibility for property tax exemptions.
- 5% Foster equal opportunity, affirmative action and employee safety.

Requirements include a Bachelor's Degree in Accounting, Business Administration, Engineering, Real Estate Appraisal, Architecture or related field; certification at the Assessor II level; five years of experience in assessing property; and knowledge of computer systems with an ability to input and extract data. Experience in management and supervision is highly desirable. Equivalent combinations of education and experience may also be considered.

Changes in the Position:

Changes in these positions include a much wider scope of responsibility for supervision and oversight. These positions previously supervised a group of Property Appraisers that were responsible for assessing one type of property. With the reorganization these positions now supervise a team of seven to eight Property Appraisers who are responsible for assessing all types of property including Personal Property, and Commercial and Residential Real Estate such as mercantile, special mercantile, apartments, condominiums, and exempt property. Revaluations are now done every year. This has resulted in much tighter deadlines but has also reduced the number of appeals. These positions are now required to help design, test and

improve computer systems and provide training for their staff. With the staff assessing all types of property there is a need for more communication between supervisors to help provide consistency and to determine best practices for all types of property assessment. With the reduction in supervisory staff these positions have more responsibility for managing their team of Property Appraisers, determining priorities, and performing their duties with less supervision.

Analysis:

Over the past several years the Assessor's Office has worked hard to create a more customer-focused environment where operations and procedures were streamlined. The computer processes were improved and internet access to assessment information was established. As part of the budget process the department has reduced the number of positions from 76 (full time equivalents) to 60 (full time equivalents). The number of management positions in the Assessor's Office has been reduced from 15 in 1990 to 10 in 2004. About four years ago the department reorganized and began the process of crosstraining their Property Appraisers so that they could assess all kinds of property rather than specializing in just one area such as Personal Property. In recognition of the additional knowledge and skill needed to perform as "generalists" the City negotiated with the Union a longer twelve step pay range but some of the steps, steps five, nine and eleven, require meeting certain criteria as outlined in the City/Union October 29, 1999 Memorandum of Understanding. The managers in the Assessment Division have not been studied and so have not received any additional pay for the increase in scope and responsibility in their positions even though they also must know all areas of assessment. Further, several of the Senior Property Appraisers earn salaries that are only slightly lower than the salary of their supervisor. Thus, there is not much financial incentive to compete for a management position. In the Management Pay Plan Study it was stated that we should strive for at least a 6.5% difference between a supervisor and a subordinate. The current difference between the maximum rates of the Senior Property Appraiser and the Supervising Assessor Assistant is just 2.6%.

The department has requested that these positions be reallocated to Salary Grade 10 to reflect the increase in duties and responsibilities. A careful review of other City supervisory positions indicates, however, that Salary Grade 9 would be more appropriate. Numerous job descriptions and announcement sheets were reviewed. Since the function of these positions is somewhat unique we focused on supervisory positions related to property and /or finances. For example, the Code Enforcement Inspection Supervisor in Salary Grade 8 is located in Neighborhood Services and is responsible for directing and supervising the operation of the Commercial Inspection Division. The position supervises a staff of 28 positions including Inspectors, support staff and three Assistant Supervisors. This position also requires a bachelor's degree and state certification. The nature of the work supervised, code enforcement, does not, however, require as high a level of knowledge and skill that is needed to perform property appraisals.

The Accounting Manager in Salary Grade 10 is located in the Comptroller's Office. The position is responsible, under the general direction of the Comptroller and his deputies, for the design, configuration, implementation and management of a uniform accounting system for the recording and reporting of all accounting transactions for the City of Milwaukee. These transactions include the accounts payable process, City debt payments, budgetary controls, revenues, expenditures, assets, liabilities and fund equities for all governmental, proprietary, fiduciary funds and accounts groups. This position supervises a staff of 17 employees and provides guidance and indirect supervision to professional and clerical financial staff in over 60 departments, bureaus, and organizational units around the City. This position also requires a bachelor's degree and five years of work experience but also requires two years of experience

supervising a professional staff. The scope of work and impact and accountability for this position is greater than the positions under study.

In consideration of the above the level for Impact and Accountability and Knowledge and Skill has increased for the positions under study. The level for Relationships Responsibility has also increased since there is a much greater need to coordinate meetings and communication among staff as everyone is working on all types of property. Further, these positions are also required to assist their staff at Board of Review hearings whenever the taxpayer has an attorney. Previously, an Assistant City Attorney was assigned. It is critical for them to make sure all appropriate information is included in the record so it may be considered if there are appeals to Circuit Court. Based on our review the management job evaluation factors should be as follows:

<u>Factor</u>	<u>Level</u>	<u>Points</u>
Impact and Accountability	10	158
Knowledge and Skill	8	111
Relationships Responsibility	8	55
Working Conditions	2	<u>7</u>
		331

Salary Grade 9 (306-351)

These levels reflect an increase in Impact and Accountability, Knowledge and Skill and Relationships Responsibility that is consistent with other supervisors in the City Service. This higher level will also eliminate the pay compression between these positions and the Senior Property Appraisers they supervise.

Recommendation:

We therefore recommend that the four positions of Supervising Assessor Assistant be reallocated to Salary Grade 009.

Supervising Assessor

The basic function of this position is to manage all aspects of the Assessment Division in an efficient manner to complete statutory requirements in a manner that assures public confidence in the department's accuracy, productivity, and fairness. The duties and responsibilities are as follows:

- 30% Supervise the determination of assessment for all real and personal property and list all exempt property on the assessment roll following State law, the Wisconsin Property Assessment Manual, and the Uniform Standards of Professional Appraisal Practice. Real Property includes vacant land, residential, apartments, condominiums, local commercial and specialty commercial properties. This includes around 150,000 Real Estate Accounts valued at approximately \$20 billion and around 11,000 Personal Property accounts valued at approximately \$700 million. This includes determining and communicating assessment policies, procedures and best practices; reviewing and evaluating assessment law changes and precedent setting case law; and coordinating the development, implementation and improvements to the department's computerized systems with the Administration Division and other City departments.
- 25% Assist the Assessment Commissioner and Chief Assessor in formulation of the department's strategic plan as well as planning policies, programs, and budgetary needs to meet the long and short term objectives of the Assessment Division. This includes developing recommendations for additions and changes to the Employee Handbook,

- monitoring progress toward completion of statutory deadlines and department objectives; creating and maintaining on-line manuals documenting such items as procedures, policies and use of computerized systems and making personnel decisions regarding Assessment Division staff.
- 25% Manage Supervising Assessor Assistants and Appraisers in the Assessment Division. This includes monitoring and evaluating progress toward Assessment Division goals and communicating results to staff and all department supervisors.
 - 15% Manage for timely and accurate completion of Assessment appeals.
 - 5% Provide accurate and timely information to government and private individuals as well as government and private organizations. This includes providing expert testimony for other City departments and representing the department at neighborhood meetings, professional organizations, educational institutions and other speaking engagements.
 - 5% Performing other office duties as assigned

The requirements for this position include a bachelor's degree in business administration, accounting, economics or related field plus five years of experience in real estate assessment including supervisory experience. Other requirements include a knowledge of real estate and personal property valuation, assessment law and precedents, state statutes, local ordinances, and the Wisconsin Property Assessment Manual; the Assessor II Certification from the State of Wisconsin; and skills in interpersonal, written and oral communication, math, computers and general management.

Changes in the Position

Changes in the position include a much wider scope of responsibility for supervision and oversight. This position previously supervised a smaller staff of three Supervising Assessor Assistants and approximately 15 Property Appraisers in the specific area of residential real estate. Now, the position supervises four Supervising Assessor Assistants and 30 Property Appraisers in all areas of Assessment including Personal Property and both Commercial and Residential real estate such as mercantile, special mercantile, apartments, condominiums, and exempt properties. This position is also now responsible for setting up or providing the training and research in conjunction with the Supervising Assessor Assistants. Knowledge of just one computer system was required in the past but now there are different computer systems for residential, mercantile condominiums, personal property and exemptions that all must be learned. Further, this position has also taken on some additional duties that have been delegated to him by the Chief Assessor such as personnel issues.

Analysis

This position has changed significantly from when it was studied and classified in 1986. The department has downsized and reorganized and this position has taken a lead role in making changes and adjustments as to how work is performed. All four Supervising Assessor Assistants report to this position that serves as the head of the Assessment Division. The department has requested that this position be reallocated to Salary Grade 12 to reflect the increase in duties and responsibilities. A careful review of other City supervisory positions indicates, however, that Salary Grade 11 would be more appropriate. For example, the Finance and Planning Manager in Salary Grade 11 is located in the Department of Public Works – Administrative Services and is responsible for all financial support services within the Department of Public Works, including budget preparation and control, accounting activities, payroll management, and procurement administration. This position also performs management audits and qualitative studies to aid in fulfilling the operational objectives of the Department of Public Works, assists the Administrative Services Director (Salary Grade 16) in long range strategic planning and provides all management functions in the absence of the Administrative Services Director. This position supervises a staff of approximately 20

employees and requires a bachelor's degree and five years of progressively responsible experience in financial management and/or budget development. Both this position and the position under study supervise a large staff and have extensive responsibility for an important function within the City of Milwaukee, one the financial support services for the City's largest department and the other the property assessments throughout the City.

The Architectural Project Manager in Salary Grade 12 is located in the Department of Public Works – Operations and is responsible for all architectural services relating to the design and construction of new structure and the renovation of existing facilities throughout the City. Duties include providing design plans; preparing specifications and other contract documentation; assigning work; reviewing and approving documents for design and construction; and assisting with the preparation of the annual Capital and Operations and Management budget. This position supervises a staff of four Architects and one Recreation Facilities Coordinator. Requirements include an Architectural Degree, registration as a professional architect in the State of Wisconsin, five years of experience in the design of buildings and structures and the ability to supervise a professional staff. Although this position does not have a large staff the impact and accountability of his or her decisions relating to the City's structures and buildings is high. While the level for knowledge and skill is comparable to the position under study, since both positions are relied upon for their extensive knowledge in their area of expertise, the level for impact and accountability is higher.

In consideration of the above the level for Impact and Accountability and Knowledge and Skill has increased for the position under study. The level for Relationships Responsibility has increased since there is a greater responsibility for communication among staff and for attending Board of Review appeal hearings and meeting with taxpayers and their representatives on the most difficult cases for all types of assessments. Based on our review the management job evaluation factors should be as follows:

<u>Factor</u>	<u>Level</u>	<u>Points</u>
Impact and Accountability	12	209
Knowledge and Skill	11	181
Relationships Responsibility	9	67
Working Conditions	1	<u>5</u>
		458

Salary Grade 11 (405 -465)

These levels reflect an increase in Impact and Accountability, Knowledge and Skill and Relationships Responsibility that is consistent with other supervisors in the City Service.

Recommendation:

We therefore recommend that the position of Supervising Assessor be reallocated to Salary Grade 011.

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

Reviewed By: *Florence Dukes*
Florence Dukes, Employee Relations Director

JOB EVALUATION REPORT

City Service Commission Meeting Date: March 16, 2004

This report recommends appropriate classification and compensation levels for one new position as part of the 2004 budget and reclassification of one current grant funded position. Both of these positions are located in the Laboratory Division of the Health Department. In reviewing these positions new job descriptions were analyzed and discussions were held with Mark Zemke, the incumbent of the Laboratory Information Systems Coordinator position, Steven Gradus, Laboratory Director, and Maria Monteagudo, Health Personnel Officer.

HEALTH DEPARTMENT

Current	Request	Recommendation
New Position	Laboratory Operations Manager SG007 (\$46,785-\$65,496)	Laboratory Operations Manager SG 007 (\$46,785 - \$65,496)
Laboratory Information Systems Coordinator PR 644 (\$44,862-\$54,513) Incumbent: Mark Zemke Current Rate: \$54,513	Laboratory Information Systems Administrator PR - To be determined	Laboratory Information Systems Specialist PR 646 (\$50,100-\$60,090) New Rate: \$56,312

Note: All rates listed in this report are 2002 rates.

Action Required:

In the Positions Ordinance, under Health Department, Laboratory Services Division, delete one position of Lab Information Systems Coordinator and one position of Administrative Lab Manager and add one position of Laboratory Information Systems Specialist and one position of Laboratory Operations Manager.

In the Salary Ordinance, under Salary Grade 007 add the title of "Laboratory Operations Manager". Under Pay Range 644, delete the title "Laboratory Information Systems Coordinator". Add a new pay range to read as follows:

Pay Range 646

Official Rate-Biweekly

1,926.91 2,007.18 2,096.66 2,165.85 2,237.32 2,311.15

Laboratory Information Systems Specialist.

Current:	New Position	
Request:	Laboratory Operations Manager	SG 007
Recommended:	Laboratory Operations Manager	SG 007

The basic function of this position is, under the direction of the Laboratory Director, to be responsible for managing all administrative and business functions within the Laboratory. This includes coordination and implementation of laboratory services and policies; quality control and quality assurance; compliance with state and federal standards; budget and grant preparation and monitoring; and safety and security activities.

The duties and responsibilities are as follows:

- 25% Laboratory Quality Control and Quality Assurance Responsibilities.** This includes assuring the proper maintenance of all policies, procedures and quality assurance practices; implementing and maintaining an effective, ongoing program to measure, assess and improve the quality of laboratory services, monitor and evaluate activities and detect risk areas; working with staff to assure regulatory compliance; assuring staff education including quality assurance, safety, security, and technical training; assuring quality assessment of laboratory support function; managing customer service issues such as timely reporting of data per customer requirements, the laboratory customer user manual, and laboratory website; assuring specimen shipping/transportation meets regulatory guidelines and customer needs; assuring efficient accessioning, data entry and reporting of laboratory data; managing and monitoring proficiency testing programs; and managing the review, compilation, and follow-up on incident reports/corrective action reports for safety, security and quality assessment.
- 70% Business and Infrastructure Related Responsibilities.** This includes coordinating and monitoring activities associated with preparation and monitoring of budget and grants, billing and payment function, procurement of laboratory supplies and equipment, contract management and inventory control; preparing or coordinating the preparation of financial management and grant progress reports; providing guidance and direction to ensure that safety and security standards are established, followed and amended as necessary in response to federal and state regulations, audits, or other directives; assisting the Laboratory Director with personnel administration related matters and assuring that issues are handled in accordance with Laboratory, Departmental and City policies and regulations; overseeing maintenance contracts and maintenance of key laboratory support equipment, such as autoclaves, glassware washers, drying ovens, and media support equipment; overseeing and monitoring key laboratory infrastructure systems maintenance with building staff and vendor contractors to assure proper, safe, and secure operations; and assisting the LIS Coordinator in assuring that the LIS meets the ongoing and changing demands of the Laboratory.
- 5% Perform Other Duties as Assigned.**

This position requires a Bachelor's Degree in Medical Technology or in one of the physical, chemical or biological sciences plus five years of general laboratory managerial/supervisory experience in a hospital or public health based laboratory. The experience must include responsibility for budget preparation and monitoring, inventory control, logistics, and information systems. Experience with laboratory information systems operations is desirable. Equivalent combinations of education and experience may also be considered.

This position will be responsible for managing business, operational and administrative functions of the Health Department's laboratory. Other positions within the Department, at the requested level, include the Clinic Operations Manager, School Health Manager and Well Women's Program Manager. These other positions are also responsible for managing a particular program or service within the Health Department. For example, the basic function of the School Health Manager is to serve as the primary contact for services provided to the school age population in Milwaukee and coordinate all system-wide and school-based services provided to Milwaukee Public Schools as well as private, parochial, charter and choice schools. The position monitors the health indicators of young children and adolescents in Milwaukee and collaborates with community partners to develop and implement appropriate interventions to

improve health outcomes of this population. Requirements include a Master's Degree in Public Health, Health Education, Administration, Nursing, Human Services, Business or related field and three years of related experience. The overall level of duties, responsibilities and requirements are comparable to the position under study.

To recruit for this new position the department will have to compete with hospitals and public health laboratories. A review of salary data for laboratory management type positions shows that the salaries vary depending on location and level of work. The requested level of Salary Grade 7 (\$46,785-\$65,496), however, is consistent with much of the data we reviewed. The requested title of Laboratory Operations Manager fits well the duties and responsibilities of the position. Based on our review the management job evaluation factors should be as follows:

<u>Factor</u>	<u>Level</u>	<u>Points</u>
Impact and Accountability	7	104
Knowledge and Skill	7	94
Relationships Responsibility	6	38
Working Conditions	2	<u>7</u>
		243

Salary Grade 7 (231-265)

We therefore recommend that this new position be classified as Laboratory Operations Manager in Salary Grade 7.

Current:	Laboratory Info Systems Coordinator	PR 644
Request:	Laboratory Info Systems Administrator	TBD
Recommended:	Laboratory Info Systems Specialist	PR 646

The basic function of this position is to have administrative responsibility for the Laboratory Information System (LIS) and the Laboratory's information technology functions. This includes security, data integrity, disaster recovery, troubleshooting, recommending and coordinating purchases and installation of needed hardware and software upgrades. This position will also help plan, develop, and ensure safe and secure data transmission to internal and external laboratory partners and ensure laboratory, regulatory, and standardization compliance under programs and regulations such as the Clinical Laboratory Improvement Act (CLIA), Health Insurance Portability and Accountability Act (HIPAA), Food and Drug Administration (FDA), National Electronic Data Surveillance System (NEDSS), and Health Alert Network (HAN).

The duties and responsibilities are as follows:

45% Support, Manage and Maintain the LIS. This includes assuring the performance of all software, the operating system, database back-ups, system shutdowns, startups and reboots; analyzing, troubleshooting, and solving all system related problems; assuring maintenance of LIS through the vendor, Task Monitoring System (TMS), and serving as the principal contact; monitoring and maintaining all peripheral equipment and maintaining inventory database; managing, maintaining and performing quality control and quality assurance functions; assuring and managing timely and accurate LIS billing files; acquiring and maintaining basic UNIX troubleshooting skills; and producing

scheduled workload reports and ad hoc reports to meet laboratory and departmental needs.

30% Supervise and Lead Informatics Development for the Laboratory. This includes representing the laboratory in departmental committee work related to information technology as needed; establishing, planning and holding laboratory LIS/IT committee meetings on a regular basis to address the needs and concerns of the staff related to LIS/IT issues; representing the laboratory as the main contact for LIS development and continuous improvement; planning, recommending, initiating and directing all system upgrades and enhancements; compiling, evaluating and implementing, under the guidance of the Laboratory Director, LIS modification requests; training employees in the use of the LIS and writing, updating and distributing training instructions in manual form as appropriate. Informatics refers to managing and transferring data and putting the data into reports.

20% Informatics Project Oversight, Data Access and Compliance. This includes developing and maintaining a user manual covering all aspects of LIS functionality including routine, emergency and disaster recovery; optimizing use of off-site reporting via electronic messaging such as auto-printing and auto-faxing; developing and implementing reporting mechanisms as needed, using SQL, ODBC and LIS-Epidemiology functionality, maintaining the functionality of the National Food Safety System's Interagency Electronic Exchange Network (eLEXNET) and assisting in the development, enhancement, and maintenance of all functions related to the Milwaukee Health Department (MHD) laboratory; assuring the interoperability of internal and external laboratory systems to maximize efficient laboratory surveillance programs; with assistance from MHD Network Administrator, developing GIS laboratory surveillance capabilities accessible to public health and private laboratories and clinicians; assuring the development and implementation of secure electronic interfaces to provide data to health agencies such as the National Laboratory Response Network (NLRN), Wisconsin Laboratory Response Network (WLRN), and Wisconsin Division of Public Health; assuring the laboratory has optimized use of Public Health LIS; participating in the review and development of data standards and vocabularies as related to laboratory test results and identification of microorganisms using LOINC, SNOMED, ICD and CPT codes; assuring LIS compliance in accordance with HIPAA, CLIA, NEDSS, HAN, and the State of Wisconsin Dairy and Water Laboratory Standards; assessing connectivity capabilities of the hardware, software, and high-speed internet and ensuring security/protection of data, information, and systems, with adequate backup, organizational and surge capacity; and working with departmental, local and state information technology staff to accomplish interfaces as needed.

5% Other Duties as Assigned

The requirements for this position include a Bachelor's Degree in Microbiology, Environmental Microbiology, or Medical Technology; eligibility for certification, within one year, by a national or state recognized certifying agency such as the National Registry for Microbiology (NRM), American Society for Clinical Pathology Medical Technologist (ASCP) (MT), or other certifying agency deemed appropriate by the Laboratory Director; familiarity of laboratory fundamentals and working knowledge of microbiological and chemistry procedures and methods, working knowledge of Windows and UNIX (AIX) operating systems; and familiarity with internet tools including Telnet and FTP. Equivalent combinations of education and experience may also be considered.

This position was created in 1995 at the current title and pay range. The basic function of the position was to coordinate all aspects of a new automated information system in the Health Department's laboratory. The nature of the work was a variety of administrative duties to maintain the system. Specific duties included training all personnel to use the system; updating and adjusting various computer files; recommending software and program changes and evaluating software upgrades; convening regular sessions of the Laboratory Information Systems Committee; troubleshooting problems; monitoring the work of laboratory support personnel; and serving as the "quality assurance coordinator". In discussions with the department and a comparison to the new job description dated November 12, 2003 we find that the duties and responsibilities of this position have grown.

The position is still responsible for supporting, managing and maintaining the LIS but now also helps to plan, develop, and ensure the safe and secure data transmission to internal and external laboratory partners, such as the state. Previously this position would review software and possible upgrades but now the system has expanded and this position must review computer hardware as well. There are now LIS computer terminals located at different Health Department Clinics and the Milwaukee County Jail. This position still is responsible for establishing, planning and holding laboratory LIS/IT Committee meetings within the Division but now represents the Laboratory and the LIS System at various departmental committee meetings and has more contact with others on a state and national level. This position is also involved with new developments such as electronic messaging and, with assistance from the Health Department's Network Administrator, the development of GIS laboratory surveillance capabilities accessible to public health and private laboratories and clinicians, and development and implementation of secure electronic interfaces to provide data to health agencies such as the National Laboratory Response Network and the Wisconsin Laboratory Response Network.

Although the duties and responsibilities of this position have expanded, the basic nature of the work is still information technology but with a need for a background in microbiology or medical technology and laboratory experience. We therefore recommend that it still be within the same job family but at a higher level. The Network Analyst series has some similar duties and responsibilities to the position under study in that they are also responsible for installing and maintaining departmental and/or Citywide computer networks and providing technical support to end users. In reviewing several job descriptions, announcement sheets and reports regarding the different levels of the Network Analyst series we did not find a good match but rather found that the position under study would best fit somewhere in between the Network Analyst – Associate in Pay Range 598 (\$46,352 - \$56,300) and Network Analyst – Senior in Pay Range 591 (\$51,907 - \$63,071). The Network Analyst – Associate level position is the journey level for positions located in line departments as opposed to the Information Technology Management Division (ITMD) of the Department of Administration. The position under study has some similarities to this level but in addition to computer knowledge the position requires a Bachelor's Degree in Microbiology or Medical Technology and knowledge of scientific procedures and methods. We recommend creating a new Pay Range 646 that would be in the job family of Microbiologists, Chemists and Virologists with rates that are in between the rates for Network Analyst – Associate and Network Analyst – Senior. We recommend the rates for the new Pay Range 646 (biweekly) to be as follows:

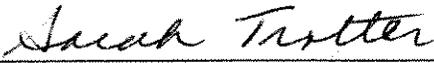
\$1,926.91 \$2,007.18 \$2,096.66 \$2,165.85 \$2,237.32 \$2,311.15

The department requested a change in title from Laboratory Information Systems Coordinator to Laboratory Information Administrator. With just a few exceptions there is a large

March 16, 2004

number of mid to high level management positions that end with "Administrator" including Network Administrator in the Health Department. Changing the title could be misleading as this is not a management position. Because of the specialized background and knowledge that is needed for this position we recommend that the title be changed to Laboratory Information Systems Specialist. .

We therefore recommend that a new Pay Range 646 be created with the rates listed above and that the position of Laboratory Information Systems Coordinator in Pay Range 644 be reclassified to Laboratory Information Systems Specialist in the new Pay Range 646.

Prepared By: 
Sarah Trotter, Human Resources Representative

Reviewed By: 
Florence Dukes, Employee Relations Director

JOB EVALUATION REPORT

City Service Commission Meeting Date: March 16, 2004

EMPLOYEE RELATIONS

Current	Request	Recommendation
Office Assistant II PR 410 \$24,928-\$29,332 Incumbent: Tony Leskovar Current Rate: \$29,332	Office Assistant IV PR 445 \$30,890-\$34,183	Office Assistant III PR 425 \$28,348-\$31,360 New Rate: \$29,636
1 New Position 2 positions-Claims Processor II PR 415 \$26,191-\$30,585 Incumbent A: Delores Kubasa Current Rate: \$30,585 Incumbent B: Kathleen Weege Current Rate: \$30,585	3 positions-Claims Processor PR 460 \$33,071-\$37,063	3 positions-Claims Processor II PR 435 \$29,601-\$32,615 New Rates: A: \$30,890 B: \$30,890
New Position	Management Services Adjuster SG 003 \$36,241-\$50,735	Management Services Adjuster SG 003 \$36,241-\$50,735
New Position	Claims Adjuster SG 002 \$34,007-\$47,604	Claims Adjuster SG 002 \$34,007-\$47,604
2 positions Personnel Analyst Senior SG 005 \$41,182-\$57,658 Incumbent: Cynthia Nowak Current Rate: \$47,986 Incumbent: Jane French Current Rate: \$57,658	2 positions Human Resources Representative SG 007 \$46,785-\$65,496	2 positions Human Resources Representative SG 007 \$46,785-\$65,496 New Rate: A: \$49,736 B: \$59,752

Note: All rates listed in this report are 2002 rates.

Action Required:

In the Salary Ordinance, under Salary Grade 003, add the title "Management Services Adjuster". Delete Pay Range 404 in its entirety. Under Pay Range 415, delete the title "Claims Processor II" and add the title "Claims Processor I". Under Pay Range 435 add the title "Claims Processor II".

In the Positions Ordinance, under Employee Relations-Employee Benefits Division, Worker's Compensation Section, delete one position of Office Assistant II and one position of Claims Processor, and add one position of Claims Processor II and one position of Office Assistant III. Under Department of Employee Relations-Operations Division, Staffing Services Section, delete two positions of Personnel Analyst-Sr. and add two positions of Human Resources Representative.

Current:	Office Assistant II	PR 410
Request:	Office Assistant IV	PR 445
Recommended:	Office Assistant III	PR 425

The basic function of this position is to perform varied clerical duties in accordance with the Worker's Compensation Section's standard procedures. Specific duties include processing bills and invoices to include authorizing, coding and payment; typing letters and forms; processing incoming section mail; answering phones; following up on worker's compensation claims by calling claimants, doctors, attorneys and city and MPS departments; updating spreadsheets for mail receipts, WC-13 forms, information on worker's compensation claims, and the CRT with correspondence and/or medical reports directed to the Adjuster; ordering supplies; preparing records, documents and other materials for shipping; filing and assisting with responses to requests for the DWD. Requirements for this position include two years of office experience including experience on a CRT and/or word processor and an ability to make independent decisions and handle a large workload with multiple activities.

The changes in the position include more responsibility in various areas. For example, the procedure for paying medical bills has become more complex. Previously, the bills came in with one dollar amount which was entered and sent for payment. Now, the bills are processed by CORVEL, a case management company that reviews and itemizes the bills, so that several lines must be combined, added up and entered before sending for payment. This process gives the department more specific information on the amount of money being paid for various medical services and treatments, but it also makes processing medical payments more detailed and complex. The department also plans to have this position prepare duty disability letters, assign vendor codes, and have more customer service contact. These new duties require attention to detail and are time sensitive. The department wishes to have this position at the same level as another Office Assistant III position in the division so that it will have flexibility in making assignments and more backup on a daily basis.

The specification for the current job classification of Office Assistant II is to perform varied office duties in accordance with standard procedures, apply knowledge of departmental policies and procedures, and use a general understanding of other departments' functions; screen telephone calls, answer questions, and provide information; work with others on a team to complete special projects; access and input information via mainframe applications; and use office equipment and microcomputer software to prepare standard and complex documents from various sources of written or dictated input. A review of the specification for Office Assistant III listed previously indicates that this position would be more properly classified as an Office Assistant III since the position has grown, is performing more detailed functions and will have additional duties of a more complex nature.

Based on the above we recommend that this position of Office Assistant II in Pay Range 410 be reclassified to Office Assistant III in Pay Range 425.

Current:	New Position (1 position)	to be studied
	Claims Processor II (2 positions)	PR 415
Request:	Claims Processor	PR 460
Recommended:	Claims Processor II	PR 435
	Claims Processor I	PR 415

This report covers two existing positions of Claims Processor II and one new position that will be performing the same duties. These positions are currently classified in Pay Range 415, having been reclassified from Pay Range 410 as part of the City-wide study of office support positions in 1995. The department is requesting that the new position and the two existing positions of Claims Processor II be placed in Pay Range 460.

A major function of this classification is the data entry of all Worker's Compensation (WC) claims into both the City's internal WC Claims Processing System (mainframe based) and the State of Wisconsin System (web based) along with the necessary coding and researching of missing information such as payroll status, hours worked and wage information. This process includes requesting initial file information and filing initial Department of Workforce Development (DWD) reports. These positions then set up folders and distribute the claims to the appropriate adjusting level based on the type of injury. In 2003 there were approximately 5,886 new and recalled claims. This function comprises approximately 40 percent of the position's time.

Other duties of this position include the processing of medical claims resulting in three days or less of lost time (25%), answering customer calls (15%), paying medical bills (5%), typing letters and performing other clerical support duties (8%), prioritizing WC claims based on date of injury (2%) and performing other miscellaneous duties (5%).

Discussions were held with Burma Hudson, Worker's Compensation and Safety Manager. According to Ms. Hudson, the major change affecting the work of these positions was the 1999 conversion by the State of Wisconsin from a paper-based process to an automated on-line data entry system. The City's Claims Processors II now log into the State's system and enter new claims electronically instead of physically sending paper claim forms to them.

This conversion has also enabled the State to more closely monitor whether organizations such as the City of Milwaukee are in compliance with various mandated deadlines. For example, the State requires that the first report of accident be reported on or before the 14th day following the injury. The initial supplementary report which lists the manner in which the injured employee is to be compensated must be reported within 30 days of the date of injury. In addition, if the employee is earning less than the State's maximum wage, the employee's wage information must also be submitted within 30 days of the date of injury. If these or other deadlines are missed, the City incurs financial penalties. Therefore, the importance of timely data entry of new claims and the filing of initial DWD reports has significantly increased for these positions.

Other than the changes discussed above, the duties and responsibilities of these positions have basically remained the same. The question becomes whether or not these positions should be reclassified and, if so, to what level. These positions are currently in Pay Range 415. Other office support classifications at this level include Communications Assistant I and Legal Office Assistant I. The Communications Assistant I is typically called upon to transfer and process information of an ordinary nature in the manner of a telephone operator that may involve

decision making within prescribed guidelines. This classification requires two years of experience performing duties related to the communications area. The Legal Office Assistant I is typically called upon to type the most basic legal documents which may include opinions, correspondence, briefs and pleadings. This position requires two years of clerical experience in a law office performing duties related to this position and the ability to type 50 wpm.

Based on a careful review of the duties, responsibility level and requirements of the Claims Processor II position as it is currently functioning, we find that it should be at a higher level than Communications Assistant I and Legal Office Assistant I, especially with the increased consequence of error (financial penalties) of not entering, setting up and processing claims in a timely manner. However, at the same time, the requested level of Pay Range 460 is too high for this classification. At that level (\$33,071 - \$37,063), the Claims Processor II would be paid higher than the Claims Assistant Representatives in Pay Range 508 (\$29,955 - \$34,509) even though the latter is responsible for more difficult and complex claims and has higher educational and experience requirements.

In evaluating the classification specifications for other office support positions, we find that the Claims Processor II position should be classified slightly higher than the Office Assistant III level (Pay Range 425) but not as high as the Office Assistant IV level (Pay Range 445). Instead, the positions under study compare most favorably with positions in Pay Range 435 in terms of level of responsibility and requirements. For example, the class specification for one position in this range, Accounting Assistant I, reads as follows:

“Performs reoccurring clerical/accounting tasks in general accounting, accounts payable, accounts receivable or a related accounting or financial area. Posts journal entries, enters data into automated data bases, processes payments and purchasing documents, verifies information, and may assist in preparing accounting reports. Uses microcomputer software and mainframe applications. May contact outside agencies to resolve problems. Requires knowledge of basic accounting terminology, accounting concepts, and purchasing procedures. May assist with basic payroll-related work, maintenance of personnel records, and benefits processing.

Requirements: Four years of clerical experience including at least one year performing basic accounting duties.”

While the above description is accounting related, many of the types of tasks performed apply to the Claims Processing II classification. In addition, the requirements for Claims Processor II are also quite similar (three years of office experience including at least one year of insurance related experience).

Based on the changes which have impacted these positions, and the level at which they are currently functioning, we recommend that the new position be classified as Claims Processor II in Pay Range 435 and that the two existing positions be reallocated to Pay Range 435. We further recommend that the underfill level of Claims Processor I, currently in Pay Range 404, be moved to Pay Range 415 to maintain the approximate differential which currently exists between the two levels.

Current:	New Position (1 position)	to be studied
Request:	Management Services Adjuster	SG 003
Recommended:	Management Services Adjuster	SG 003

This position will be responsible for the detailed, day-to-day monitoring of all pending City of Milwaukee and Milwaukee Public Schools Worker's Compensation (WC) claims on the State of Wisconsin's database that are being handled at the Claims Adjuster and Claims Representative levels. This Adjuster will also be responsible for obtaining required information from doctors, City departments or injured employees and submitting answers either directly into the State's database or in writing in order to meet the State's reporting deadlines. In addition, this position will be responsible for the final closure of claims at the Claims Representative and Claims Adjuster level in order to ensure that all required reports and information have been submitted so that the City will not face a potential penalty situation. This function comprises approximately 40 percent of the position's time.

This position will have its own case load and will serve as back-up, when needed, at the Claims Adjuster and Claims Representative adjusting levels. The remaining duties include adjusting WC claims with a high degree of complexity (15%), conducting thorough investigations, identifying critical issues on WC claims and drawing proper conclusions and decisions (5%), actively pursuing end of healing and return to work options (10%), making both medical and indemnity payments in accordance with WC law (10%), identifying possible subrogation options and protecting the City's interest (5%), filing appropriate forms with the State in accordance with reporting requirements (10%) and performing special assignments as designated by the Supervisor/Manager such as assisting with Occupational/Safety matters (5%).

This position has no formal supervisory responsibility but will act with the Worker's Compensation and Safety Manager's authorization to provide direction to the Claims Adjusters and Representatives regarding compliance issues with their claims. This position may also assist the Worker's Compensation and Safety Manager with special projects such as arranging safety awareness training, complying with OSHA reporting requirements, conducting ergonomic studies and presenting safety information at new employee orientation sessions when the Manager is unavailable.

According to the job description provided by the department, this position requires a related Bachelor's or Associates degree and three years of experience adjusting WC claims at the Claims Adjuster level. The ability to manage a high volume claim inventory and current working knowledge of WC law are also required.

Approximately half of the duties to be performed by this position are identical to those being performed by the Claims Adjusters in Salary Grade 002. What distinguishes this position from Claims Adjuster, however, is the case monitoring function and related follow-up activities necessary to ensure that all deadlines are met and cases are properly closed out in the State's system. This represents having ultimate responsibility for avoiding penalties on approximately 1100 claims. This function is currently being performed by the Worker's Compensation and Safety Manager. The other distinguishing function is assisting the Manager on various occupational and safety issues and projects as described above.

While this position will not supervise the Claims Adjusters and Representatives, the process of monitoring their cases and engaging in necessary follow-up with these positions places it somewhat in the role of a lead worker. It is likely that this position would be used as a resource by the Claims Adjusters and Representatives when they encounter difficulties or unusual situations with their cases. This monitoring responsibility and relationship lends credence to placing this position above the Claims Adjusters which are in Salary Grade 002. In addition, the occupational and safety related projects which this position will most likely be involved such as performing ergonomic assessments and planning and coordinating safety training appear to be at the level expected of a Human Resource Analyst in Salary Grade 003. While these projects will constitute a relatively small percentage of the position's time, combining this with the monitoring responsibility appears to justify placing this position in Salary Grade 003.

We therefore recommend that this position be classified as Management Services Adjuster in Salary Grade 003 and be given the following profile on the job evaluation factors:

	<u>Level</u>	<u>Points</u>
Impact & Accountability	4	68
Knowledge & Skill	3	49
Relationships Responsibility	3	22
Working Conditions	1	<u>5</u>
TOTAL:		144

Salary Grade 003 points: 132-151

Current:	New Position (1 position)	to be studied
Request:	Claims Adjuster	SG 002
Recommended:	Claims Adjuster	SG 002

The basic function of this position is to adjust Worker's Compensation claims at the intermediate level. These include claims with a high degree of complexity such as serious injuries which usually result in long and chronic disabilities.

Discussions were held with Burma Hudson, Worker's Compensation and Safety Manager. Ms. Hudson confirmed that this new position would be functioning in the same manner as the two current positions of Claims Adjuster. Indeed, the job description submitted for this position was identical to the existing Claims Adjuster job description.

We therefore recommend that this new position be classified as Claims Adjuster in Salary Grade 002 and be given the same profile on the job evaluation factors as are currently established for the existing Claims Adjuster positions:

	<u>Level</u>	<u>Points</u>
Impact & Accountability	3	60
Knowledge & Skill	2	41
Relationships Responsibility	2	18
Working Conditions	1	<u>5</u>
TOTAL:		124

Salary Grade 002 points: 115-131

Current: Personnel Analyst Senior SG 005
(2 positions)
Request: Human Resources Representative SG 007
Recommended: Human Resources Representative SG 007

In 2003 the Department of Employee Relations merged with the Fire & Police Commission. As separate entities, each department had staffing functions that handled job analysis, recruitment, test development, and test administration for specific City departments. The Fire & Police Commission testing staff has handled the Fire and Police departments. The Department of Employee Relations has handled general City of Milwaukee departments as well as non-classified positions with the Milwaukee Public Schools. During 2004, the intent is to bring together these separate staffing functions and create a merger of functions and efficiencies wherever possible.

The positions considered in this report include the two Personnel Analyst Senior (SG 005) positions that have handled staffing functions for the Fire and Police departments. These positions report to the Supervisor of Examinations for the Fire & Police Commission. As the section reorganizes, the primary focus of these positions will be staffing functions for the Fire and Police departments, but incumbents will also perform staffing functions for general City of Milwaukee departments. In addition, incumbents will be called upon to perform other human resources functions including diversity issues, organizational development, compensation, and labor relations.

Duties and responsibilities for these positions in the area of staffing include:

- Advise and assist public safety and other city departments and employees on staffing related issues.
- Develop valid selection processes, including conducting job analysis and test research, developing examinations, scoring systems and eligible lists, and administering examinations, all consistent with professional standards and legal guidelines.
- Develop and implement recruitment plans and strategies
- Participate in ongoing human resources planning with public safety departments.
- Provide training, guidance and assistance to both outside persons and departmental personnel in staffing related issues
- Process candidates for appointment to public safety departments, including medical examinations, drug screen tests, background investigations and appeals, and psychological examinations.

This report will compare the revised duties and scope of responsibilities of the Personnel Analyst Senior (SG 005) positions to those of the Human Resources Representatives (SG 007). There are currently three Human Resources Representative positions in the department: two that perform primarily Compensation Services and one that performs primarily Staffing Services. The primary duties and responsibilities of the staffing position are to advise and assist City departments and employees on staffing related issues. This includes:

- Explain selection options and processes to customers
- Develop content valid selection processes
- Develop and implement recruitment plans and strategies
- Administer tests consistent with professional and legal guidelines
- Participate in ongoing human resource planning with City departments
- Provide training, guidance and assistance to those who conduct employment interviews.

The primary duties and responsibilities of the compensation positions are to advise and assist City departments in all facets of their pay and benefit needs. This includes:

- Study new and existing jobs for proper classification
- Perform special pay studies
- Research and recommend special pay adjustments
- Communicate information concerning pay and benefits to departments and employees
- Assist customer departments in resolving the compensation impacts of reorganizations and job restructuring
- Provide training and other support concerning compensation issues.

The requirements for both the positions under review and the current Human Resources Representatives are a Bachelors degree in personnel management, industrial relations, public administration, psychology, business administration or related field and a minimum of three years of successful experience performing related duties at or above a journey worker level.

All current Human Resources Representatives, regardless of the primary focus of work (i.e. staffing or compensation) may be called upon to perform work in another functional area as necessary. This could include performing work in the areas of staffing, diversity issues, organizational development, compensation, and/or labor relations. The two positions under study will perform work assignments in the same manner as the current Human Resources Representatives. The primary focus of work will be staffing, but incumbents will work in other functional areas as needed.

Incumbents at the Human Resources Representative level are expected to provide consultative services to internal or external customers by providing authoritative answers to questions, interpretation of employment laws, rules, policy and procedures, and sound advice. They are expected to develop new and/or improved human resources products and processes and conduct research related to the development of improved services and delivery. They are also expected to serve in a leadership capacity for other departments on city-wide projects involving team participation, serve as a resource person in their area of expertise, and serve as a coach to less experienced staff. Individuals in these positions may represent the department before commissions, boards and Common Council committees.

In examining the job descriptions for the current Personnel Analyst-Senior positions, and in discussion with department managers, it is clear that the two positions under study have considerable latitude in establishing work methods and that the scope and level of responsibilities for these two positions are already above that of journey worker level positions. In our judgment these positions are comparable in scope and responsibility to the current Human Resource Representatives (SG 007) in Employee Relations.

For these reasons, we recommend reclassifying these positions as Human Resource Representatives in Salary Grade 007. An assessment of these positions according to the management job evaluation factors is as follows:

	<u>Level</u>	<u>Points</u>
Impact & Accountability	7	104
Knowledge & Skills	7	94
Relationship Responsibility	7	46
Working Conditions	1	<u>5</u>
TOTAL:		243

Salary Grade 007 points (231-265)

Prepared By: Timothy Keeley
Timothy Keeley, Human Resources Representative

Sarah Trotter
Sarah Trotter, Human Resources Representative

Andrea Knickerbocker
Andrea Knickerbocker, Human Resources Manager

Reviewed By: Florence Dukes
Florence Dukes, Employee Relations Director