



Department of Employee Relations

Tom Barrett
Mayor

Maria Monteagudo
Director

Michael Brady
Employee Benefits Director

Deborah Ford
Labor Negotiator

May 1, 2014

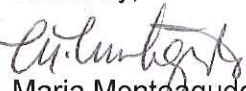
To the Honorable
The Committee on Finance and Personnel
Common Council
City of Milwaukee

Dear Committee Members: Re: Common Council File Number **140052**

The following classification and pay recommendations were approved by the City Service Commission on **April 29, 2014**.

In the Employees' Retirement System, one new position was recommended for classification as ERS Business Operations Analyst, Pay Range 1EX.

The job evaluation report covering the above positions, including the necessary Salary and Positions Ordinance amendments, is attached.

Sincerely,

Maria Monteagudo
Employee Relations Director

MM:fcw
Attachments: Job Evaluation Report
Fiscal Note

C: Mark Nicolini, James Carroll, Dennis Yaccarino, Deborah Ford, Nicole Fleck, Jerry Allen, Beth Conradson Cleary, And Melody Johnson



JOB EVALUATION REPORT

City Service Commission Date: April 29, 2014

Employees' Retirement System

Current	Request	Recommendation
New Position	Database and Research Analyst PR 1GX (\$65,777 - \$92,089)	ERS Business Operations Analyst PR 1EX (\$57,884 - \$81,034)

Action Required – Effective Pay Period 1, 2014 (December 22, 2013)

In the Salary Ordinance, under Pay Range 1EX, add the title “ERS Business Operations Analyst”.

In the Positions Ordinance, under Employees' Retirement System, Management Support Services, delete one position of “Employees' Retirement System Database and Research Analyst” and add one position of “ERS Business Operations Analyst”.

Background

Earlier this year, Jerry Allen, Executive Director of the Employees' Retirement System (ERS), requested that a new position of “Database and Research Analyst” included in the 2014 budget be studied for appropriate title and pay level. In conjunction with this study, a job description created by the ERS was reviewed and several discussions were held with Beth Conradson Cleary, Deputy Director of the department, to whom this position will report.

Duties, Responsibilities and Requirements

The basic function of this position is to identify, plan, and lead department-wide projects to improve the effectiveness and efficiency of the department's operations. Because the department relies heavily upon its information technology system and components, including complex databases, to administer retirement benefits for 12,400+ retirees and beneficiaries, many improvement projects will require a high-level skill in using database query and reporting software to extract useful data from the MERITS system.

As stated in the position's job description and elaborated upon during discussions with Ms Conradson Cleary, duties and responsibilities will include the following:

- leading department-wide process improvement projects;
- applying IT knowledge and skills in a number of areas, including extracting and analyzing data from the department's database,
- creating standard and *ad hoc* reports from MERITS (a task currently performed by an outside contractor);
- documenting and updating complex decision-making flow charts with an application called ARIS;
- overseeing databases for public records requests and vendors;
- supervising two employees; and

- conducting pension-related research for management and the Annuity and Pension Board.

The most salient knowledge, skills, abilities, and competencies needed to successfully perform the job (not necessarily those required upon hire) include:

- Knowledge of business process modeling tools and quality management principles and techniques
- Knowledge of principles and processes for providing customer services
- Skill in talking with others to convey ideas and information effectively
- Skill in giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate
- Skill in identifying complex problems and reviewing related information to develop and evaluate options and implement solutions
- Skill in using the following technology: database query and reporting software, specifically SEQUEL; charting software; enterprise application integration software, eg extensible markup language XML; project management software; and standard office software
- Skill in leading project teams through the project lifecycle, including planning, execution, monitoring, and evaluation
- Skill in writing complex reports that may be of a technical nature appropriate for the needs of the audience
- Ability to take initiative to identify opportunities for improvement and independently organize and carry out business improvement efforts
- Ability to develop constructive and cooperative working relationships with others, and maintain them over time.

The minimum requirements for the job at the time of hire include:

- A bachelor's degree in business, computer science, management information systems, research or closely related field. A master's degree is highly desirable.
- Experience in retirement system processes and operations including knowledge of Chapter 36 and ERS Board Rules and regulations
- Three years of experience in the administration of a staff in a project-oriented environment
- Three years of work experience in research and data analysis and the preparation of written reports

The requirements listed above are intended to provide general information about the level of knowledge and skill required to perform the job. They have not been assessed by the Staffing Division of the Department of Employee Relations for purposes of employee selection.

Analysis

In assessing the level of responsibility and knowledge/skill associated with this position, the context of where the work will be performed is important. Following is a very brief description of the scope of the Employees' Retirement System and an assessment of its complexity.

The mission of the Employees' Retirement System (ERS) is to faithfully administer a multi-employer retirement plan, in all its variations, as set forth in the City Charter and

referenced in some 1,800 legal opinions. In doing so, the ERS provides services to active employees, retirees, and beneficiaries; maintains member records and demographic information; administers health plans for retirees; administers the City's group life insurance program; and invests and manages the funds of the Trust, currently \$4.9 billion, in a prudent and vigilant manner. The Employees' Retirement System has approximately 11,000 active members. Each month the ERS issues \$26 million in retirement benefits to some 12,400 retirees and survivors.

Although the ERS primarily serves City of Milwaukee employees and retirees, employees in seven other organizations are also included in the System:

1. Milwaukee Metropolitan Sewerage District
2. Veolia Environmental Services Solid Waste, North America
3. Milwaukee Area Technical College
4. Wisconsin Center
5. Housing Authority of the City of Milwaukee
6. Redevelopment Authority of the City of Milwaukee
7. Milwaukee Public Schools

In addition, the ERS administers the following benefits programs for sworn employees in the Fire Department; sworn employees in the Police Department, general City employees, and elected officials:

- Service retirement
- Disability retirement
- Separation benefits
- Death benefits
- Survivorship options
- Group life insurance
- Retiree health and dental insurance

Lastly, the ERS oversees the City's contributions to Social Security and Medicare.

The rules determining retirement benefits are very complex, governed by Chapter 36 of the City Charter, labor contracts, and more than 1,800 legal opinions. According to a consultant who performed an organizational review of the ERS in 2009, this extraordinary level of complexity makes the ERS more comparable to much larger retirement systems, citing as an example the Tennessee Consolidated Retirement System which manages separate plans for 500 employers. The consultant further stated that the ERS may in fact "be one of the most complex public pension agencies in the United States." (*Organizational Review, Final Report*, L.R. Wechsler, May 14, 2009, p.50)

Given the complexity of work processes associated with the administration of retirement benefits, the knowledge and skill required to enter the job under consideration will require a significant amount of preparation in terms of education and work experience. This level, in our opinion, equates to that of a fully-experienced professional with three to five years of work experience. Furthermore, it follows that the learning curve for the job, meaning the time that would be required for a competent employee to become a fully versed in almost all aspects of the job, would be considerable. It would not be unreasonable to expect that the learning curve would be from two to four years.

There are a number of positions and several job series in City government that perform analytical work that is similar to the position under consideration in this report. The three most prominent series are that of Fiscal Planning Specialist, Budget and Management Analyst, and Auditor. Like the position under study, employees in these occupations identify and analyze complex fiscal, budgetary, and operational issues and summarize their findings in written reports. They must identify and frame issues, locate relevant data, discuss issues with departmental representatives, analyze quantitative and qualitative data, develop alternatives courses of action, and summarize their findings. Employees in these jobs must use software to locate, extract, manipulate, and analyze relevant data. In addition, they must have good interpersonal skills to work effectively with managers in other departments, colleagues, and elected officials.

There is a learning curve associated with these jobs that is typical for professional occupations. Generally speaking, entry-level professionals are considered to be learning the job and usually receive more direction and coaching from their supervisors. More experienced professionals are expected to work independently and master all aspects of their job. Advanced professionals generally possess the highest degree of expertise and may develop a specialized expertise in an aspect of their occupation. They may lead projects, train new employees, and mentor newer colleagues. The following table provides pay levels for the Fiscal Planning Specialist series and Budget and Management Analyst series in the Budget and Management Division and the Auditor series in the Comptroller's Office.

Fiscal Planning Specialist, Budget and Management Analyst, and Auditor Series

Title	PR	Minimum	Maximum
Budget and Policy Manager	2LX	\$70,126	\$98,173
Fiscal Planning Specialist-Sr.	2KX	\$65,777	\$92,089
Budget and Management Special Assistant	2IX	\$57,884	\$81,034
Fiscal Planning Specialist	2IX	\$57,884	\$81,034
Budget and Management Analyst-Lead	2GX	\$50,959	\$71,349
Budget and Management Analyst-Senior	2FX	\$47,816	\$66,946
Budget and Management Analyst	2DN	\$42,079	\$58,907
Information Systems Auditor	2JX	\$61,721	\$86,406
Auditor-Lead	2HX	\$54,322	\$76,046
Auditor-Senior	2EX	\$44,857	\$62,799
Auditor	2GX	\$50,959	\$71,349

The nature of work performed by the position under consideration is also related to another group of jobs in City government, that of business operations managers. Each of the three following positions described is allocated to pay range 1FX, which ranges from \$61,721 to \$86,406 annually. One business operations manager is responsible for all staff, budgeting, contract administration (including those for capital improvements), purchasing, accounting, and payroll for the Milwaukee Public Library which has independent contracting authority. Another position is responsible for all business operations in the Department of Neighborhood Services. The third such position manages all business operations and related staff of the Milwaukee Health Department which includes extensive grants administration, accounting, budgeting, contract administration, and payroll. The scope of these jobs is consequently quite broad. The

nature of work performed by the position under consideration is related to each of the series mentioned.

The next step is to determine an appropriate pay level for the job. The most important factors in making this determination are the level of responsibility associated with a job and degree of knowledge/skill required for successful job performance.


A position's level of responsibility is indicated by such factors as the scope and complexity of responsibilities, consequence of error associated with those responsibilities; number and variety of employees supervised; external and internal contacts and the purpose of those contacts; the degree of authority to establish standards and make decisions impacting the department's operations or resources; authority for human resources and employee relations. The factor of knowledge and skill includes the degree of education and training required to perform the work, however learned or acquired.


Several aspects of the position under consideration in the ERS warrant consideration. Firstly, the position will supervise two employees in carrying out projects. Secondly, the individual hired for the job will have the potential to significantly impact the efficiency and effectiveness of the department's operations. Thirdly, as mentioned previously, the learning curve for the job, meaning the time that would be required for a competent employee to fully learn the job, is expected to be considerable.


In comparing and contrasting the position under consideration with each of the series described, it is obvious that the knowledge and skill required for successful job performance is quite high. For that reason, it appears appropriate to place the job above the level of Auditor-Lead or Budget and Management Analyst-Lead (\$54,322 to \$76,046). The level of responsibility exercised does not, however, appear to equal that of the Business Operations Managers discussed (\$61,721 to \$86,406). We therefore recommend the intermediate pay level \$57,884 to \$81,034 annually in Pay Range 1EX with the title of ERS Business Operations Analyst.

Recommendation

It is recommended that the new position in the ERS described in this report be allocated to Pay Range 1EX with the title of ERS Business Operations Analyst.

Prepared by: 
Laura Sutherland, Human Resources Representative

Reviewed by: 
Andrea Knickerbocker, Human Resources Manager

Reviewed by: 
Maria Montegudo, Employee Relations Director