



Department of Employee Relations

Tom Barrett
Mayor

Maria Monteagudo
Director

Michael Brady
Employee Benefits Director

Troy M. Hamblin
Labor Negotiator

April 26, 2007

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

Dear Committee Members: Re: Common Council File Number 070159

The following classification and pay recommendations were approved by the City Service Commission on April 24, 2007:

In the Comptroller's Office:

One position of Public Debt Specialist, Salary Grade 010, held by Richard Li, was recommended for reclassification to Public Debt Specialist, Salary Grade 012.

One position of Revenue & Financial Services Specialist, Salary Grade 010, held by Mark Wyss, was recommended for reclassification to Revenue & Financial Services Specialist, Salary Grade 012.

In the Department of City Development, one position of Milwaukee Economic Development Corporation Director, Salary Grade 016, was recommended for reclassification to Neighborhoods Business Development, Salary Grade 012.

In the Employees' Retirement System, one new position was reclassified as Information Systems Manager-ERS, Salary Grade 011, was recommended for reclassification to Information Systems Manager-ERS, Salary Grade 012.

In the Health Department, one position of Office Supervisor II, Salary Grade 02 was recommended for reclassification to Administrative Assistant IV, Pay Range 550.

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

Sincerely,



Maria Monteagudo
Employee Relations Director

MM:fcw

Attachments: 4 Job Evaluation Report
Fiscal Note

C: Mark Nicolini, Renee Joos, Marianne Walsh, Troy Hamblin, W. Martin Morics, Michael Daun, Craig Kammhoiz, Diane Marek, Richard Li, Mark Wyss, Richard Marcoux, Martha Brown, Paulette Douglas, Judy Allen, Martin Matson, Bevan Baker, Michelle Stein, Victoria Robertson

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JOB EVALUATION REPORT

City Service Commission Meeting Date: April 24, 2007

Department: Office of the Comptroller

Current	Request	Recommendation
Public Debt Specialist Salary Grade 010: \$62,288 - \$87,205 Step 12: \$87,205 Incumbent: Richard Li	Study of Position	Public Debt Specialist Salary Grade 012: \$70,767 - \$99,074 Step 9: \$90,382
Revenue & Financial Services Specialist Salary Grade 010: \$62,288 - \$87,205 Step 6: \$72,580 Incumbent: Mark Wyss	Study of Position	Revenue and Financial Services Specialist Salary Grade 012: \$70,767 - \$99,074 Step 3: \$75,230
<p>Rationale:</p> <p><u>Public Debt Specialist:</u> The duties and responsibilities of this position have changed from primarily coordinating the sale of Public Debt to performing extensive analysis and serving as a financial advisor to the City resulting in large savings of time and money.</p> <p><u>Revenue & Financial Services Specialist:</u> The duties and responsibilities of this position have changed by providing more extensive analysis of business operations, fiscal priorities and pending state legislation. This position also provides fiscal analysis of operations of various boards and commissions of which the City Comptroller is a member, tax incremental districts, and requests from the Common Council through the Comptroller.</p>		

Action Required

In the Salary Ordinance:

Under Salary Grade 010, delete the titles of "Public Debt Specialist" and "Revenue and Financial Services Specialist".

Under Salary Grade 012 add the titles of "Public Debt Specialist" and "Revenue and Financial Services Specialist".

Background

In a letter dated June 1, 2006, W. Martin Morics, Comptroller, requested a position upgrade for two positions in the Financial Services Section of the Comptroller's Office. A Job Analysis Questionnaire was completed by both incumbents and discussions were held with the

incumbents and their supervisor; Craig Kammholz, Financial Services Director; and Michael Daun, Deputy Comptroller.

Public Debt Specialist

The basic function of this position is to provide the City with borrowed proceeds as required and as authorized by the Common Council, maintain the City's access to the Capital Markets, provide borrowed funds on a timely basis in order for the City to meet its financial obligations, obtain the lowest cost financing and maximum financial flexibility for the City's borrowings, and provide prudent management and stewardship of the Public Debt Amortization Fund. The duties and responsibilities are as follows:

- 50% Structuring and Issuance of Debt – Understand the financial, fiscal, policy, and other constraints that affect City borrowings; design and develop alternative financing structures that meet City, regulatory, and legal constraints; prepare, submit, and support resolutions for the borrowing of City debt; manage and coordinate outside professionals in the debt issuance process; prepare and assemble City debt documents; prepare and analyze budget and spending reports to project City cash needs; gather City data for disclosure documents; and explain proposed financings with rating agencies, credit enhancers, purchasers, and investors.
- 25% Management and Planning for Debt and the Public Debt Amortization Fund – Maintain database of information on debt issued; ensure that the City is in compliance with debt covenants; project debt trends and implications; prepare, maintain and update debt related policies; keep current on changes in state and federal laws and regulations related to debt issuance; monitor outstanding debt and other financial obligations; maintain relationships with the rating agencies, potential purchasers, and potential investors; maintain information on authorized and unissued debt; and stay up to date on projects that have borrowed proceeds.
- 10% Ad Hoc Financial and Other Analyses – Review and analyze proposed Tax Incremental District (TID) applications; research and analyze projects as assigned; review, analyze, and comment on proposed legislation; and analyze and assist other entities where the City's Comptroller is a Board Member.
- 10% Miscellaneous Division Management – Provide staff support for the Public Debt Commission, and budgeting for the Division and Debt Service.
- 5% Management of Outside Professionals – Determine scope of services of outside professionals; write requests for proposals (RFP's) to engage outside professionals such as Bond Counsel, Financial Advisors, and Underwriters; solicit and review responses, and recommend the selection of a firm; monitor and regularly review the firm's provisions of services to the City; adjust services and expectations as needs of the City change; determine how Emerging Business Enterprise firms can be developed into lead firms; and implement the program.

Requirements for this position include a Master's Degree in Finance, Law, or Business and five years of experience in public finance. This position also requires a knowledge of quantitative analysis and modeling, financial analysis, accounting, legal reasoning, financial markets, the legislative process, fixed income capital markets, publicly traded securities, risk/reward characteristics of debt and debt like instruments, the differences

between various classes of investors in municipal obligations and between various channels to reach those investors; an ability to do spreadsheets and word processing; an ability to read, understand, and interpret laws and regulations such as Federal and State Municipal Bond Laws, Banking Regulations, Internal State Revenue Code and Regulations regarding the issuance of tax exempt bonds, state and local laws regarding the issuance of debt, Securities and Exchange Commission Regulations and market place conventions regarding issuance of debt in tax exempt markets and taxable markets, rules and regulations from the National Association of Securities Dealers (NASD) and the Municipal Bond Rulemaking Board (MBRB), and Banking Regulations regarding corporate trust operations, federal wire systems, and the clearing of security transactions. Other requirements include communication and presentation skills, and experience with public finance debt structuring software. Equivalent combinations of education and experience may also be considered.

Changes in the Position

The current incumbent was appointed in 2002 and brought to the position an extensive educational and work experience background, including over twelve years in public finance investment banking, which far exceeded the requirements of the position. This background has allowed the position to take on additional and more complex duties that were not previously a part of the job. Changes in the position include the following:

- A reduction in the administrative work of this position has resulted in more time for managing the overall debt issuing process and investigating other opportunities.
- More time is spent on expanding the financing options of the City such as the use of Interest Rate Exchange Agreements, variable rate general obligation bonds, pension obligation financing for Milwaukee Public Schools, and other revenue obligations.
- Responsibility for regularly monitoring the variable rate obligations and Interest Rate Exchange Agreements to lower the overall cost of borrowing and maintaining financial flexibility.
- Debt management and debt structuring software is now being used to quickly access current and historical information regarding the City's debt and provide detailed analyses of financing options.
- More of the day-to-day legal compliance matters are being handled by this position in consultation with Bond Counsel. Previously, the Deputy City Attorney assigned to this area handled all discussions with Bond Counsel.
- Increase in responsibility for preparing the \$140 million budget for debt service including the \$68 million levy amount.

Analysis

This position was last studied in 2000 as part of the Market Study Report that was conducted on all positions in the Comptroller's Office. The position was reclassified from Staff Assistant-Senior in Salary Grade 008 to Public Debt Specialist in Salary Grade 010 based on market comparisons. A comparison to the job description at that time and the current job description indicates some changes as listed above. The position previously was responsible for coordinating the work of all the parties involved with a sale of public debt and did some analysis such as sale sizing analysis. The position now, however, not only coordinates all the work but also does extensive analysis and serves as a financial advisor to the City. More emphasis has been placed on improving the process and using other means of financing such as Interest Rate

Exchange Agreements and variable rate general obligation bonds that require continuous monitoring. This position managed the refinancing of one quarter of the City's debt that resulted in a savings to the City of \$5.5 million dollars. Other improvements to reduce interest costs have resulted in additional savings.

This position also is the primary contact for bond counsel. Previously, the Deputy City Attorney assigned to Public Debt played a significant role in coordinating the sale and was the primary contact with bond counsel. The current incumbent, who has an extensive background in Public Debt, has taken on this responsibility. The current Assistant City Attorney assigned to Public Debt still reviews related documents but is not as involved with the overall coordination of the Public Debt sale. The position under study has also implemented procedural and policy changes that have saved the City time and money. For example, this position has streamlined the bidding process so that the Public Debt Commission meetings have been shortened from a few hours to less than a half hour and has reduced administrative duties so there is more time to analyze and evaluate different financing mechanisms and tools to reduce costs to the City.

The position under study is unique but comparisons were made to other positions in the City Service that had some similarities including the following: (Please see chart on page 9)

Executive Director-Deferred Compensation Board (Salary Grade 011)

The basic function of this position is to serve as the Executive Administrative Officer of the Deferred Compensation Plan and provide policy recommendations to the Deferred Compensation Board on plan marketing and participant education strategies; and plan investment portfolio management. This position also provides plan financial analysis to the Board and overall plan administration oversight. This position reports directly to the Board and serves as the Board Secretary. Specific duties include Plan Administration (60%), Financial Management (20%), and Contract Administration (20%). This involves planning, organizing, and supervising the work of service contractors and office support staff; and establishing and maintaining effective working relationships with other City officials and departments, Board members, plan service contractors, and plan participants. The value of the Deferred Compensation Plan fund as of June 30, 2006 was \$529 million.

Investments and Financial Services Manager (Salary Grade 012)

The basic function of this position is to be responsible for the management of City funds in the custody of the City Treasurer. This includes supervising the accounting of all receipts and disbursements by the department, the employee judgment account administration, and payroll operations; and making necessary settlements with other governmental units of tax levy collections. Specific duties include cash management (40%), general fund accounting (30%), payroll administration (15%), tax collection (5%), public pension fund accounting (5%), and additional duties such as compiling and maintaining standard operating procedures (5%). This position supervises three positions and is responsible for the day-to-day management of funds in each portfolio that can reach a balance of several hundred million dollars and accounting transactions that have an annual dollar volume of several billion.

Finance and Administration Manager (Salary Grade 012)

The basic function of this position is to be responsible for accounting, budgeting, and financial administration services for the Department of City Development (DCD), Redevelopment Authority (RACM), Neighborhood Improvement Development Corporation (NIDC), Tax Incremental Districts (TID) and City of Milwaukee programs. Specific duties include supervising general accounting function such as the preparation of financial reports and statements; providing direction for the preparation of annual budgets and related reports for the Department

of City Development, RACM, and NIDC; supervise cash and investment management functions such as investing excess cash and liquidating investments; review and execute all deeds, notes, satisfactions, subordinations and other legal documents; review documentation and sign checks for payments to contractors, banks, and loan receivers; and approve all loans being made from grant funds. This position has oversight of 14 positions in DCD, RACM, and NIDC.

Comparisons were also made to positions in other cities as well as the private sector. Generally, other cities had positions at a higher level that were in charge of a Division or Department and/or positions at a lower level with less responsibility. In the private sector salaries were generally higher, although the salaries sometimes included bonuses that could vary from year to year. As this position has taken on more responsibility for the sale of debt and is directly involved with reviewing and researching different financing options the impact and consequence of error has increased. The Department has indicated, and the requirements reflect, that they would need to recruit from the external market for any future hires due to the knowledge and experience requirements. Therefore, flexibility in a beginning rate may be necessary for recruitment in the future.

A review of the management job evaluation factors indicates that the levels should be increased. Based on our review the management job evaluation factors should be as follows:

Factor	Level	Points
Impact & Accountability	12	209
Knowledge & Skill	11	181
Relationship Responsibility	10	80
Working Conditions	1	5
Total Points		475
Salary Grade 012: 466-534 Points		

Recommendation

Based on the above analysis we recommend this position of Public Debt Specialist in Salary Grade 010 be reallocated to Salary Grade 012.

Revenue and Financial Services Specialist

The basic function of this position is to analyze and make recommendations on various complex financial data in several forms. This includes preparing the City's revenue budget and the annual State Financial Report; analyzing proposed State legislation for fiscal and service impacts, Tax Incremental Districts (TID) Projects for cash flow and financial feasibility; gathering statistical information and authoring the Annual Review of Lending Practices of Area Financial Institutions; preparing the Combined Annual Property Tax Report; and preparing various financial analyses to assist the City Comptroller in his role on many boards and committees, and to assist in the decision making process and the formation of City policy. The duties and responsibilities are as follows:

25% Revenue Budget – Analyze and quantify revenue estimates from various City departments; assemble revenue budget and process the Budget and Management Division (BMD – 2) form by established deadlines; respond to Department and Budget Office requests for additional analysis of revenue estimates; analyze requests for new

revenues for quantity and collectability; perform trend analysis in an attempt to accurately estimate revenues; and interact with departments at varying levels of authority.

- 20% State Financial Report Form B – Plan timetable for accurate completion of report; download expenditure and revenue data for all funds during operating year under analysis; analyze information and compare with prior year data; apply overhead application rate to fringe benefits and apply to all allocatable functions; submit report by deadline established by state statute; and reconcile report to City of Milwaukee's independent audit report.
- 12% Annual Report on Lending Practices – Assemble pertinent lending data from available sources; create complex spreadsheets that distributes data based on race, income, and location, and insert data; analyze data and compare to prior year reports; draft text of report disseminating data, explain results, and identify areas of current and future concern; and distribute report to the Common Council, area lenders, and area media.
- 12% Supervision of the Revenue and Financial Services Assistant – Plan work of position; evaluate accomplishments; assign projects; perform performance evaluations; and recommend discipline and/or advancement when required.
- 10% Analysis of Proposed State Legislation for Fiscal Impacts to City – Analyze pending state legislation; research present statutes and determine what change may be effectuated by proposed legislation; seek input from various stakeholders; and draft a response outlining the fiscal and policy impacts that may effect City operations.
- 8% Financial Analysis of Funds – Perform financial analyses of City Tax Incremental Districts (TID's) including TID carrying costs, cash flows, and balance sheets; operating funds, enterprise funds etc. to ascertain viability and sustainability.
- 8% Analysis of Financial Information for Various Projects – Analyze financial information to assist the City Comptroller in his role of serving on boards and commissions for various institutions.
- 5% Preparation of annual "Tax Dollar" Report – Prepare the annual property tax report called "Tax Dollar" that is distributed to every taxpayer in the City.

Requirements for this position include a Bachelor's Degree in Accounting, Finance, or related area and five years of experience in municipal finance or accounting and enterprise wide experience. Other areas of experience include managing budgets, making decisions, analyzing and implementing policies, effectuating change, working with others with varying levels of knowledge of governmental operations, supervision and working with electronic spreadsheets. This position also requires an ability to know and understand complex governmental operations; relationships between the executive, administrative, and operational aspects of government; how policy and finance effect each other; governmental accounting and budgeting principles; and also an ability to perform complex financial analysis and prepare reports; extensive quantitative and statistical analysis including mathematical model development; and clearly articulate ideas and effectively communicate analytical data. Equivalent combinations of education and experience may be considered.

Changes in the Position

The changes in the position include the following:

- Function of position has changed from primarily reporting data to providing analysis of business operations, fiscal priorities, and pending state legislation for fiscal and operational impacts.
- Provides fiscal analysis of operations of various boards and commissions of which the City Comptroller is a member.
- Provides fiscal analysis of TID's that includes ascertaining when TID's will become solvent, if the TID will have cash flow, and reviewing the initial analysis by the Department of City Development and/or their consultants. Periodically revisits TID's to check status of the proposed project plan and whether the initial cash flow projections are still valid after all costs have been incurred and tax incremental revenue streams have begun.
- Performs financial forecasting which includes developing revenue fiscal forecasting models to project over longer time lines the City's potential for revenue, commenting on City's current and near term economic condition, performing SWOT (Strength, Weaknesses, Opportunities, Threats) analysis, and coordinating work with the analysis being done in the Budget Office. The goal is to identify potential strengths and weaknesses within a timeline that allows the City to take action in anticipation of economic opportunities or threats.
- Provides suggestions and solutions based on an enterprise wide view and understanding of the organization. This requires knowledge of governmental operations from all aspects, an understanding of how each function of municipal operations relies on each other, an ability to understand complex concepts and short and long term impacts of areas of analysis, and an ability to work with director-level individuals.
- Provides fiscal analysis of items requested by the Common Council through the Comptroller. These requests usually relate to operational analysis of a department or fiscal impacts of a proposed new fee or service. Provides insight and advice on material impacts, fiscal capacity and program effectiveness.

Analysis

This position was also last studied in 2000 as part of the Market Study Report for all the positions in the Comptroller's Office. This position was reclassified from Revenue and Financial Services Assistant-Senior in Salary Grade 008 to Revenue and Financial Services Specialist in Salary Grade 010. A comparison to the job description at that time and the current job description indicates some changes as listed above. For example, the shift in emphasis from reporting data to providing analysis in a number of areas including TIF's and operations of various boards and commissions on which the Comptroller is a member. Similar to the Public Debt Specialist this position has taken on additional duties and responsibilities based in part on the experience and skills that the incumbent has brought to the position such as extensive fiscal analysis and financial forecasting several years into the future. With these tools the position has been able to take on these additional duties and serve as an internal financial advisor. Some of the projects and reports that this position has taken on to research, analyze, and make recommendations involve hundreds of millions of dollars and the impact and accountability of this position has increased.

This position is also unique but comparisons were made to other positions in the City Service that had some similarities including the following: (Please see chart on page 9)

City Economist (Salary Grade 11)

The basic function of this position is to take the lead on evaluating and making recommendations on strategic issues that require knowledge of economic theory, mathematical modeling skills, probability theory, statistics, or econometrics; and provide support to the Budget and Management Division staff on the use of analytical and mathematical tools to evaluate strategic issues that are of vital concern to the City. Specific duties include leading, designing, executing, and/or reviewing evaluations of special projects of crucial strategic concern to the City, presenting findings and recommendations to policy makers, acting as a liaison between participating professionals (attorneys, actuaries, etc.) and policy makers, making recommendations on strategy based on contacts with these professionals, and serving as the Budget Director's designee in meetings with policy makers (30%); planning and conducting strategic fiscal planning for the City, developing probabilistic models to ascertain the likelihood of various projections; and presenting findings and recommendations to policy makers (20%); conducting original research on issues of strategic concern to the City (20%); advising Budget and Management Division staff on the use of various technical analytical tools (10%); analyzing budgets for ERS and some special purpose accounts, forecasting annual health account expenditures, evaluating cost effectiveness of City health insurance policy and making recommendations for policy on required employee contributions (10%); commenting to the media on economic issues affecting the City (5%); and providing advice and support to other City departments (5%).

Legislative Fiscal Manager – Senior (Salary Grade 012)

The basic function of this position is to manage specific legislative priorities as determined by the Director and Legislative Fiscal Manager-Senior, and assist the Director with the day-to-day Division operations. Specific duties include preparing reports and correspondence related to fiscal and legislative issues, attending committee hearings and meetings of government entities and other groups that have an interest in the City's legislative agenda, participating in internal and external planning and strategy meetings, and working closely with the Director to develop and implement the City's legislative agenda; (65%) maintaining an active liaison with officials and representatives at all levels of government for the purpose of securing cooperation and assistance in carrying out the Division's objectives; (30%) and assisting the Director in the day-to-day operations of the Division (5%).

Finance and Administration Manager (Salary Grade 012)

The basic function of this position is to be responsible for accounting, budgeting, and financial administration services for the Department of City Development (DCD), Redevelopment Authority (RACM), Neighborhood Improvement Development Corporation (NIDC), Tax Incremental Districts (TID) and City of Milwaukee programs. Specific duties include supervising general accounting function such as the preparation of financial reports and statements; providing direction for the preparation of annual budgets and related reports for the Department of City Development, RACM, and NIDC; supervise cash and investment management functions such as investing excess cash and liquidating investments; review and execute all deeds, notes, satisfactions, subordinations and other legal documents; review documentation and sign checks for payments to contractors, banks, and loan receivers; and approve all loans being made from grant funds. This position has oversight of 14 positions in DCD, RACM, and NIDC.

Comparisons were made to positions in other cities as well as the private sector. As stated earlier, other cities generally had positions at a higher level that were in charge of a Division or

Department and/or positions at a lower level with less responsibility. Salaries were generally higher in the private sector although some included bonuses that could vary year to year. As this position has taken on more responsibility for doing research and written analysis directly for an elected official, and some of the Boards and Commissions on which the elected official is a member, the impact and consequence of error has increased. This position has less structure and requires some creativity in providing highly complex financial analysis that can impact policy and the City's financial base. As the position requires a broad perspective and experience, the Department has indicated that they would need to recruit from the external market for any future hires. Therefore, flexibility in a beginning hiring rate may be necessary for recruitment in the future.

A review of the management job evaluation factors indicates that the levels should be increased. Based on our review the management job evaluation factors should be as follows:

Factor	Level	Points
Impact & Accountability	12	209
Knowledge & Skill	11	181
Relationship Responsibility	10	80
Working Conditions	1	5
Total Points		475
Salary Grade 012: 466-534 Points		

Recommendation

Based on the above analysis we recommend this position of Revenue and Financial Services Specialist in Salary Grade 010 be reallocated to Salary Grade 012.

Comparison Chart

Department	Title	Salary Grade
Comptroller's Office	Public Debt Specialist	10
Comptroller's Office	Revenue and Financial Services Specialist	10
Administration – Budget and Management Division	City Economist	11
Comptroller's Office – Special Purpose Account	Executive Director – Deferred Comp Board	11
City Development	Finance and Administration Manager	12
City Treasurer's Officer	Investments and Financial Services Manager	12
Administration - Intergovernmental Relations Division	Legislative Fiscal Manager - Senior	12

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

Reviewed by: *Maria Monteagudo*
Maria Monteagudo, Employee Relations Director

JOB EVALUATION REPORT

City Service Commission Meeting: April 24, 2007
 Department: City Development
 Current Incumbent: Vacant

Current	Requested	Recommended
Milwaukee Economic Development Corporation Director SG 016 (\$91,340 - \$127,883)	Manager, Neighborhoods Business Development SG 012 (\$70,767 - \$99,074)	Neighborhoods Business Development Manager SG 012 (\$70,767 - \$99,074)

Background

In a letter dated March 27, 2007, the Deputy Commissioner of City Development, Martha Brown, requested that the vacant position of Milwaukee Economic Development Corporation (MEDC) Director be reclassified to Manager, Neighborhoods Business Development. In studying this request, the staff reviewed a new job description submitted for the position and compared it to other planning and economic development positions.

According to the letter from Deputy Commissioner Brown, the Department of City Development has decided to reconceptualize the position of MEDC Director, which has been vacant for some time, to better meet the needs of the City. The newly reconceptualized position will focus upon neighborhood revitalization and microeconomic development. Major responsibilities of the job will include guiding the development of revitalization strategies; directing a staff of five professionals and two interns; and personally managing revitalization and development projects.

Duties and Responsibilities

This position will report to the Commissioner of City Development and manage the following commercial revitalization programs:

- Main Streets
- The Façade Grant
- Retail Investment Fund
- Business Improvement Districts,
- Street Scaping

Management of these programs will require the employee filling the position to establish annual program goals and objectives; apply for grants; monitor grant funds; establish relationships with community stake holders in revitalization; assign work and projects to a staff of five full-time employees; communicate results to a number of stakeholders, including policy makers and funders; and work with peers in the Department to ensure the completion of goals and objectives.

As project manager, the employee hired for this position will write feasibility plans and plans for Tax Incremental District projects; build support for projects among policymakers; and ensure timely completion of projects and required reporting.

In addition, the employee hired for this position will represent the City in activities that promote Milwaukee's neighborhoods as center of commercial investment opportunity.

Requirements for the position include a bachelor's degree in urban planning, business administration, public administration or related field and demonstrated ability to develop and manage programs. Although not stated in the job description, a well-qualified individual for this type and level of position would be expected to possess seven or more years of work experience in microeconomic development.

The job analysis indicates that this is a higher-level microeconomic development position comparable to such position as the Assistant Planning Director, which is also allocated to Salary Grade 12. The Department's request to place this position in Salary Grade 12 therefore appears appropriate. The profile for the "new" position of Neighborhoods Economic Business Development Manager is shown in the table below.

**Job Evaluation Profile for
Neighborhoods Business Development Manager**

Job Evaluation Factor	Level	Points
Impact and Accountability	13	241
Knowledge and Skill	11	181
Relationship Responsibilities	11	97
Working Conditions	1	5
Total		524
The range for SG 12 is 466-534 points		

Action Required

In the Salary Ordinance, under Salary Grade 016, delete the title "Milwaukee Economic Development Corporation Director" and under Salary Grade 012, add the title "Neighborhoods Business Development Manager".

In the Positions Ordinance, under Department of City Development, General Management and Policy Development Decision Unit, Milwaukee Economic Development Corporation (MEDC), delete the title "Milwaukee Economic Development Corporation Director (X)(Y)" and add the title "Neighborhoods Business Development Manager (X)(Y)".

Prepared by:



Laura E. Sutherland, Human Resources Representative

Reviewed by:



Maria Monteagudo, Employee Relations Director

JOB EVALUATION REPORT

City Service Commission Meeting: April 24, 2007
 Department: Employees' Retirement System

This report recommends an appropriate classification and compensation level for a vacant position of Information Systems Manager-ERS in the Employee Retirement System. In reviewing this position, staff analyzed a new job description and held discussions with Martin Matson, ERS-Deputy Director. The following chart summarizes the recommendation.

Current	Request	Recommendation
Information Systems Manager-ERS SG 011 (\$66,407 - \$92,966)	Chief Information Officer SG 014 (\$80,405 - \$112,571)	Information Systems Manager-ERS SG 012 (\$70,767 - \$99,074) * *Ability to recruit at any step with the approval of Employee Relations and the Chair of Finance & Personnel

Action Required

In the Salary Ordinance, under Salary Grade 011, delete the title "information Systems Manager-ERS". Under Salary Grade 012, add the title "Information Systems Manager-ERS 3/" and add footnote "3/" to read as follows: "Ability to recruit at any step with the approval of employee Relations and the Chair of Finance and Personnel."

Background

The Employee Retirement System (ERS) is requesting the reclassification of its Information Services Manager, Salary Grade 011. The position is currently vacant, but was previously held by incumbent Jon Granger, whose position was footnoted at rates consistent with Salary Grade 014.

Duties and Responsibilities

The basic function of the position as currently envisioned by the department includes responsibility for planning and managing information technology projects and the information technology environment within ERS. This includes developing and implementing system changes and improvements, as well as supervising ongoing information technology support for the department. The duties, responsibilities, and requirements include:

- 50% Direct the execution of the Milwaukee Employees' Retirement Information System (MERITS), and manage multiple hardware and software vendors, multiple contractors and assigned staff. The position supervises the work of 5 ERS staff members and about 15 contractors.
- 20% Supervise the operations and maintenance of the information technology environments of ERS' business applications and office automation systems.
- 10% Manage the procurement of business computer systems, professional services, operations/support services, and computer software and equipment, including RFP's, proposal evaluation, vendor selection, and contract development.

- 10% Coordinate with City departments, member agencies and service provider on ERS information system issues and other related duties.
- 5% Prepare, maintain and manage ERS' information technology plans and related budgets.
- 5% Prepare reports for management, subcommittees, and the ERS Board.

The position requires a Bachelors degree in Management Information Systems, Computer Science, Business Administration or closely related field and five years developing and operating major financial systems planning, development implementation and operations in a government environment. The incumbent must have experience in planning and managing large-scale technology budgets and projects and administering a staff of professionals in a project-oriented environment.

Analysis

The scope of responsibility for information systems has changed since the initial creation of this position in 2000. The classification of Information Systems Manager-ERS was originally created to plan and manage information technology projects and environments within ERS. The position was to be responsible for developing and implementing system changes and improvements as well as supervising ongoing information technology support for the department. In 2000, ERS systems included two mainframe-based applications supported by the Department of Administration-Information and Technology Management Division. The position was responsible for maintaining a network of three file servers, forty workstations, and standard workstation software.

The job analysis indicates that with the implementation of the MERITS system in ERS, the scope of responsibility and knowledge level of the position has increased. The MERIT system requires knowledge of 19 different component software packages used to run the system. The position must also now handle multiple vendor contracts, multiple contracted employees, hardware and software upgrade/maintenance agreements, and an expanded network with over 40 files servers and 60 workstations. The position supervises 5 department staff and 15 external contractors.

The following chart includes a comparison to other positions responsible for managing large-scale information technology systems and projects within the City of Milwaukee.

City of Milwaukee Information Technology Management Positions

Title/Department	Scope of Duties	SG	Range
Information Systems Mgr DOA-ITMD	Manage technical architecture for city-wide systems; manage FMIS/HRMS service provider contract; manage city-wide technical support services; supervises 18 staff as well as contractors	015	\$85,699 - \$119,976
Enterprise Systems Mgr DOA-ITMD	Monitor FMIS/HRMS service provider for production availability and production cycle completion; manage development and upgrades of FMIS/HRMS; supervises 5 staff as well as contractors	013	\$75,421 - \$105,598

Applications Development Mgr DOA-ITMD	Manage legacy applications development; direct software engineering; manage software engineers; develop E-Government applications; supervises 11 staff as well as contractors	012	\$70,767 - \$99,074
Library Technical Services Mgr Library	Manages operations and improvements of IT for MPL; manage automation budgets, initiatives, and contractors, responsible for all library network services including hardware, software, cabling, and maintenance; manages bibliographic and cataloging databases; manages selection of Library materials in duplicate formats; supervises 42 staff as well as contractors	012	\$70,767 - \$99,074
Network Planning Mgr DPW-Administrative Services	Manages system development, information management, applications development and security management for DPW networks; responsible for hardware and software upgrades and system enhancements; supports telecommunications and networking needs; supervises 11 staff as well as contractors	012	\$70,767 - \$99,074
Functional Applications Mgr Comptroller	Responsible for analysis, design, testing, maintenance and operation of City's HRMS/Payroll system; maintain module setup and configuration; supervises 5 staff as well as contractors	012	\$70,767 - \$99,074
<i>Information Systems Mgr-ERS Employee Retirement System</i>	Manage IT projects and the IT environment within ERS. Develop and implement system changes and improvements; manage IT support for department; supervises 5 staff as well as contractors	011	\$66,407 - \$92,966
Information Systems Mgr-MPD Police	Responsible for design, maintenance and operation of Police data communication systems; supervises 30 staff including contractors	011	\$66,407 - \$92,966

In reviewing other related positions city-wide, the most comparable appear to be positions in Salary Grade 012 that are also responsible for managing large-scale system development projects. These include the Applications Development Manager in DOA-ITMD, the Library Technical Services Manager for the Milwaukee Public Library System, and Network Planning Manager in DPW-Administrative Services. Each of these positions is responsible for managing project development, software upgrades, related budgets and contracts, internal information technology staff, and external contractors.

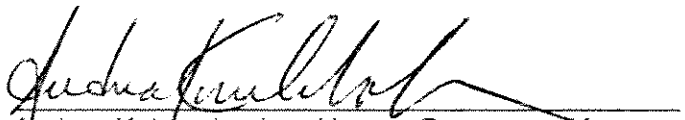
The changes brought about by the implementation of the new MERIT system in ERS as well as comparison to other information technology management positions in the city warrant upward reclassification of the Information Systems Manager-ERS. Based on our review the management job evaluation factors should be as follows:

Factor	Level	Points
Impact & Accountability	13	241
Knowledge & Skill	11	181
Relationship Responsibility	9	67
Working Conditions	1	5
Total Points		494
Salary Grade 012 466-534 points		

Based upon this analysis, we recommend that the Information Systems Manager-ERS be reallocated to Salary Grade 012.

The department has also expressed concern that the initial steps of Salary Grade may not be high enough to attract a highly qualified candidate to this position. In order to attract a candidate that posses the right background and experience, we recommend the ability to recruit candidates for this position at any step in the salary grade with the approval of Employee Relations and Chair of Finance and Personnel.

Prepared By:


Andrea Knickerbocker, Human Resources Manager

Reviewed By:


Maria Monteagudo, Employee Relations Manager

JOB EVALUATION REPORT

City Service Commission Meeting Date: April 24, 2007

Department: Milwaukee Health Department

Present	Request
Title: Office Supervisor II	Title: Executive Administrative Assistant II
Salary: SG 02 (\$37,392 - \$52,340)	Salary: 02 (\$37,392 - \$52,341)
Step: Not Applicable	Source: Department
Recommendation:	
Title: Administrative Assistant IV Salary: PR 550 (\$43,910 - \$50,242)	
Rationale: The duties and responsibilities of this position and level of work performed conform to the definition of an Administrative Assistant IV as outlined in <i>Office Support and Related Job Classifications in City Government</i> , Department of Employee Relations, 1996.	

Action Required:

In the Positions Ordinance, under Health Department, Administration Division, delete one position of "Office Supervisor II" and add one position of "Administrative Assistant IV".

Background

On February 29, 2007, in a letter to the Department of Employee Relations, the Commissioner of Health, Bevan K. Baker, requested that a position of Office Supervisor II, Salary Grade 02, be reclassified to Executive Administrative Assistant II in the same Salary Grade. In studying this request, the staff reviewed a job description submitted by the Health Department dated January 31, 2007 and held discussions with Health Personnel Officer Michelle Stein.

As stated in Commissioner Baker's correspondence, the request to reclassify this position is based upon a change in the position's duties and responsibilities. In the past, the primary purpose of the position was to supervise all office support employees and processes in the Health Department. The position's current focus, however, will be to work with and assist the Commissioner of Health, Communications Officer, and Health Personnel Officer. Although the position will continue to supervise Office Assistants, this aspect of the job will become secondary to working with the individuals in the Commissioner's Office.

Duties and Responsibilities

The duties and responsibilities associated with this position will include:

- Maintaining and coordinating schedules
- Responding to requests for information
- Screening telephone calls and inquiries
- Compiling and summarizing data for reports and presentations
- Taking and preparing minutes of meetings
- Receiving, routing, and tracking correspondence and required responses
- Preparing reports and communications, some of which are sensitive, confidential, or complex
- Providing administrative assistance to special committees and task forces
- Provide oversight and supervision of office support personnel with a focus on improving work flow.

The most notable knowledge, skills, abilities, and competencies of this job are:

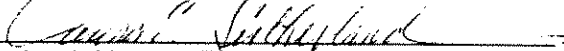
- Ability to prioritize and handle multiple tasks with different deadlines
- Ability to write clearly and informatively
- Ability to read, analyze, and interpret complex documents
- Ability to format, draft, proof, and review reports
- Ability to use advanced features of standard office software, particularly word processing, spreadsheets, databases, calendars, and presentations
- Ability to build and maintain good working relationships with a multi-cultural, multi-disciplinary staff, members of the public, the media, policy makers and representatives from other agencies
- Ability to perform all duties with diplomacy, tact, and discretion

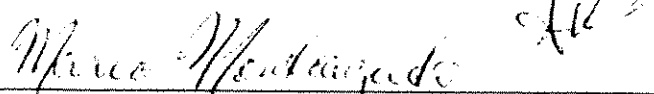
Analysis

Although the request to reclassify this position to an Executive Administration Assistant is logical, this title has a very limited application in government and is in fact *used only for secretarial assistants to elected officials*. For that reason, we cannot recommend reclassification of this job to the title requested.

Alternatively, we recommend that title of Administrative Assistant IV, Pay Range 550. This is the highest level of the classification series associated with administrative assistant /secretarial work in City government. The type of duties and responsibilities and level of work performed by employees at this level, as described in the document *Office Support and Related Job Classifications in City Government*, 1996, match that of the position under consideration here.

For that reason, we recommend that this position be reclassified to Administrative Assistant IV, Pay Range 550 (\$43,910-\$50,242).

Prepared by: 
Laura Sutherland, Human Resources Representative

Reviewed by: 
Maria Montezgudo, Employee Relations Director