

Job Evaluation Report

City Service Commission Meeting: March 9, 2021

Department of Administration-Budget and Management Division

Current			
Title	Pay Range	Rates	Positions
Budget and Management Director	1NX	\$103,841 - \$145,382	One
Financial Operations Manager	1KX	\$85,757 - \$120,064	One
Budget and Policy Manager	2LX	\$70,827 - \$99,154	One
Capital and Debt Specialist	2LX	\$70,827 - \$99,154	One
Fiscal Planning Specialist – Senior	2KX	\$66,435 - \$93,010	Two
Budget and Management Special Assistant	2IX	\$58,462 - \$81,844	Three

Recommended			
Title	Pay Range	Rates	Positions
Budget and Management Director	1NX	\$103,841 - \$145,382 Recruitment at \$114,226 and may be at any point in the range with the approval of DER and the FPC Chair	One
Budget and Fiscal Policy Operations Manager	1LX	\$91,404 - \$127,962 Recruitment is at \$100,543 and may be at any point in the range with the approval of DER and the FPC Chair	One
Budget and Fiscal Policy Manager	2MX	\$75,478 - \$105,669 Recruitment is at \$83,026 and may be at any rate in the range with DER approval.	Two
Budget and Fiscal Policy Analyst IV	2LX	\$70,827 - \$99,154 Recruitment is at \$77,909 and may be at any rate in the range with DER approval.	Five
Budget and Fiscal Policy Analyst III	2KX	\$66,435 - \$93,010 Recruitment is at \$73,078 and may be at any rate in the range with DER approval.	Underfill
Budget and Fiscal Policy Analyst II	2JX	\$62,338 - \$87,270 Recruitment is at \$68,571 and may be at any rate in the range with DER approval.	Underfill
Budget and Fiscal Policy Analyst I	2IX	\$58,462 - \$81,844 Recruitment is at \$64,308 and may be at any rate in the range with DER approval.	Underfill

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

Background

The Department of Administration (DOA) has requested a classification and market study of the positions in the Budget and Management Division. New job descriptions were provided and discussions were held with Sharon Robinson, Administration Director; Dennis Yaccarino, Budget and Management Director; Eric Pearson; Financial Operations Manager, and Mason Lavey, Budget and Management Special Assistant.

This report recommends implementing a series of four 'Budget and Fiscal Policy Analyst' titles and two higher 'Budget and Fiscal Policy Manager' titles. With each ascending title, there is an increased level of responsibility, additional and more complicated duties, as well as higher minimum competencies and requirements. The Budget and Fiscal Policy Analyst IV title serves as the highest position authority level in the analyst series. The titles of Budget and Fiscal Policy Analyst I, II, and III serve as underfill titles and each incumbent may be promoted through this title series based upon evidence of achieving higher level competencies

and meeting minimum experience requirements. These minimum requirements and competencies have been created through collaboration between Budget Office and Employee Relations staff. Pay level recommendations take into consideration the cost of labor for similar positions in southeastern Wisconsin. The following chart outlines the responsibilities, minimum competencies and requirements by title.

Budget and Fiscal Policy Analyst IV - Five Positions
<p><u>Basic Functions</u></p> <p>Serves as a highly experienced professional budget, management, and fiscal policy analyst. Performs functions that are critical to developing the Mayor's annual budget, monitors the impact of expenditures, and proposes operating and capital annual budgets, revenues, and fiscal policy for at least one operationally or financially complex department, fund, or program in addition to several other city departments. Provides direction, guidance, and training to lower level analysts on complex financial, policy, and budget process issues.</p>
<p><u>Duties and Responsibilities</u></p> <ul style="list-style-type: none"> • Improve the management of city services by ensuring that the Mayor, Common Council, Budget and Management Director and city managers understand the cost of services, the relationships between expenditure levels and service levels, and the opportunities (and related challenges) to improve productivity and service quality. • Take responsibility for a major department, enterprise fund, issues in the Accountability in Management (AIM) process and focus that process on the effective management of city services by reporting on productivity, service quality and results. • Improve City operations by monitoring and projecting citywide operational expenditures on a quarterly and year-end basis by recommending strategies to achieve both departmental goals and limiting the use of Contingent Fund appropriations. • Conduct research and analyses on issues that affect service capacity, quality and productivity • Perform budget analysis and strategic planning responsibilities for assigned departments and issues, including development of proposed budgets that meet expenditure targets for assigned departments. Recommendations should demonstrate an understanding of the assigned department's services and how they relate to the needs of the community. • Work with the Budget Director and city departments to coordinate departmental fiscal requests and budgetary recommendations with the City of Milwaukee's short and long-term goals in mind. • Analyze how changes in the assigned department's budget and personnel affect service levels and reflect these changes by developing pertinent performance measures. • Prepare and present oral and written communications to the Mayor, Common Council and other public officials. • Performs both short-term and long-term financial, management and policy studies.
<p><u>Experience/Education Minimum Requirements</u></p> <ul style="list-style-type: none"> • Bachelor's degree in public administration, business administration, political science, finance or a related field from an accredited college or university. • Four years of progressively responsible experience as a budget and management analyst or an equivalent position performing fiscal and management analysis functions.
<p><u>Job Specific Core Competencies</u></p> <ul style="list-style-type: none"> • Diagnostic Information Gathering: Identifying the information needed to clarify a situation, seeking that information from appropriate sources, and using skillful questioning to draw out the information, when others are reluctant to disclose it. • Building Collaborative Relationships: The ability to develop, maintain, and strengthen partnerships with others inside or outside of the organization who can provide information, assistance and support. • Persuasive Communication: The ability to plan and deliver oral and written communications that are impactful and persuasive with their intended audiences. • Forward Thinking: Anticipating the implications and consequences of situations and taking appropriate action to be prepared for possible contingencies. • Adaptability: The ability to keep functioning effectively when under pressure and/or experiencing rapidly changing or uncertain conditions, and to maintain self-control in the face of hostility or provocation. • Initiative: Identifying what needs to be done and doing it before being asked to or required by the situation.

Budget and Fiscal Policy Analyst III - Underfill TitleBasic Functions

Serves as an experienced budget, management, and fiscal policy analyst. Performs functions that are critical to developing the Mayor's annual budget, monitoring the impact of expenditures, and proposes operating and capital annual budgets, revenues, and fiscal policy for at least one operationally or financially complex department, fund, or program, in addition to several other city departments.

Duties and Responsibilities

- Improve the management of city services by ensuring that the Mayor, Common Council, Budget and Management Director and city managers understand the cost of services, the relationships between expenditure levels and service levels, and the opportunities (and related challenges) to improve productivity and service quality.
- Take responsibility for assigned departments and issues in the Accountability in Management (AIM) process and focus that process on the effective management of city services by reporting on productivity, service quality and results.
- Improve city operations by monitoring and projecting departmental operational expenditures on a quarterly and year-end basis and by recommending strategies to achieve departmental budget targets.
- Conduct research and analyses on issues that affect service capacity, quality and productivity
- Perform budget analysis responsibilities for assigned departments and issues, including development of proposed budgets that meet expenditure targets for assigned departments. Recommendations should demonstrate an understanding of the assigned department's services and how they relate to the needs of the community.
- Work with the Budget Director and city departments on coordinating their fiscal requests and budgetary recommendations with the City of Milwaukee's short and long-term goals in mind.
- Analyze how changes in the assigned department's budget and personnel affect service levels and reflect these changes by developing pertinent performance measures.
- Prepare and present oral and written communications to the Mayor, Common Council and other public officials.

Job Specific Core Competencies

- Budget analysis and administration: Demonstrates the ability to perform these duties and responsibilities in an effective manner.
- Budget process and structure: Demonstrates an understanding of the city budget process and structure.
- Financial Software: Demonstrates the ability to use financial and personnel databases in support of job duties and responsibilities.
- Personal Credibility - Demonstrated concern that one be perceived as responsible, reliable, and trustworthy.
- Analytical Thinking: Approaching a problem by using a logical, systematic, sequential approach.
- Results Orientation: Focusing on the desired end result of one's own or a team's work; setting challenging goals, focusing effort on the goals, and meeting or exceeding them.
- Diagnostic Information Gathering: Identifying the information needed to clarify a situation, seeking that information from appropriate sources, and using skillful questioning to draw out the information, when others are reluctant to disclose it.
- Building Collaborative Relationships: The ability to develop, maintain, and strengthen partnerships with others inside or outside of the organization who can provide information, assistance and support.
- Performs both short-term and long-term financial, management, and policy studies

Experience/Education Minimum Requirements

- Bachelor's degree in public administration, business administration, political science, finance or a related field from an accredited college or university.
- Two years of progressively responsible experience as a budget and management analyst or an equivalent position performing fiscal and management analysis functions.

Budget and Fiscal Policy Analyst II - Underfill TitleBasic Functions

Serves as a budget, management, and fiscal policy analyst. Assists with the development of the annual Executive Budget, performs fiscal policy analysis, operating budget administration for four or five assigned general city departments, and completes duties as assigned.

Duties and Responsibilities

- Lead the development of the annual Proposed Executive budget for assigned departments' operating and capital budgets, including recommendations for service levels, expenditures, funded position strength, performance measures, and funding strategies.
- Support strategic planning related to assigned departments, in order to establish meaningful and verifiable objectives.
- Use planning and trend information to help identify expenditure and service priorities.
- Perform analysis for the Accountability in Management (AIM) program for assigned departments.
- Update and revise department performance measures for annual Budget recommendations.
- Monitor and evaluate assigned departments' productivity and service quality.
- Conduct research pertaining to assigned departments that supports the improvement of service quality and operating productivity.
- Develop recommendations regarding requests to fill vacant positions; monitor operating budget results and identify potential problems; develop fiscal notes and operating projections for proposed legislation.
- Performs both short-term and long-term financial, management, and policy studies.

Job Specific Core Competencies

- Budget analysis and administration: Demonstrates the ability to perform these duties and responsibilities in an effective manner.
- Budget process and structure: Demonstrates an understanding of the city budget process and structure.
- Financial Software: Demonstrates the ability to use financial and personnel databases in support of job duties and responsibilities.
- Personal Credibility - Demonstrated concern that one be perceived as responsible, reliable, and trustworthy.
- Analytical Thinking: Approaching a problem by using a logical, systematic, sequential approach.
- Diagnostic Information Gathering: Identifying the information needed to clarify a situation, seeking that information from appropriate sources, and using skillful questioning to draw out the information, when others are reluctant to disclose it.
- Building Collaborative Relationships: The ability to develop, maintain, and strengthen partnerships with others inside or outside of the organization who can provide information, assistance and support.

Experience/Education Minimum Requirements

- Bachelor's degree in public administration, business administration, political science, finance or a related field from an accredited college or university.
- One year of progressively responsible experience as a budget and policy analyst or an equivalent position performing fiscal and management analysis functions.

<p>Budget and Management Analyst I – Underfill Title</p> <p><u>Basic Functions</u> Serves as an entry-level budget, management, and fiscal policy analyst. Assists with the development of the annual Executive Budget, performs fiscal policy analysis, operating budget administration for four or five assigned general city departments, and completes duties as assigned.</p> <p><u>Duties and Responsibilities</u></p> <ul style="list-style-type: none"> • Lead the development of the annual Proposed Executive budget for assigned departments' operating and capital budgets, including recommendations for service levels, expenditures, funded position strength, performance measures, and funding strategies. • Support strategic planning related to assigned departments, in order to establish meaningful and verifiable objectives. • Use planning and trend information to help identify expenditure and service priorities. • Perform analysis for the Accountability in Management (AIM) program for assigned departments. • Update and revise department performance measures for annual Budget recommendations. • Monitor and evaluate assigned departments' productivity and service quality. • Conduct research pertaining to assigned departments that supports the improvement of service quality and operating productivity. • Develop recommendations regarding requests to fill vacant positions; monitor operating budget results and identify potential problems; develop fiscal notes and operating projections for proposed legislation. • Performs both short-term and long-term financial, management, and policy studies. <p><u>Job Specific Core Competencies</u></p> <ul style="list-style-type: none"> • Budget analysis and administration: Demonstrates the ability to perform these duties and responsibilities in an effective manner. • Budget process and structure: Demonstrates an understanding of the city budget process and structure. • Financial Software: Demonstrates the ability to use financial and personnel databases in support of job duties and responsibilities. • Personal Credibility - Demonstrated concern that one be perceived as responsible, reliable, and trustworthy. • Analytical Thinking: Approaching a problem by using a logical, systematic, sequential approach. • Diagnostic Information Gathering: Identifying the information needed to clarify a situation, seeking that information from appropriate sources, and using skillful questioning to draw out the information, when others are reluctant to disclose it. • Building Collaborative Relationships: The ability to develop, maintain, and strengthen partnerships with others inside or outside of the organization who can provide information, assistance and support. <p><u>Experience/Education Minimum Requirements</u></p> <ul style="list-style-type: none"> • Bachelor's degree in public administration, business administration, public policy, finance or a related field from an accredited college or university.

This report further recommends creating the title of Budget and Fiscal Policy Manager for two positions. This title will be a competitive promotional opportunity for incumbents in the Budget and Fiscal Policy Analyst series. One position will focus on capital and debt management and a second position on the policy direction of major city programs as well as functions and activities within the Budget and Management Division. The following chart outlines the responsibilities, minimum competencies and requirements for these two positions of Budget and Fiscal Policy Manager.

Budget and Fiscal Policy Manager - Capital and Debt Management – One PositionBasic Functions

Propose and analyze policy direction for the City's capital improvements program. Provide detailed analysis, proposes policy initiatives, and furnishes reports on the condition, needs, planning and financing of all City infrastructure and other capital improvement projects. Develops recommendations for debt policies and a sustainable level of annual borrowing.

Duties and Responsibilities

- Makes recommendations to maintain compliance with statutory debt limit and locally-determined debt utilization goals which requires the responsible use of liquidity, the Debt Fund balance, and the Public Debt Amortization Fund; collaborate with the Comptroller's Office regarding multi-year debt forecasts and Debt Fund balance projections; and develop annual debt levy projections associated with the Six-Year Capital Improvement Plan.
- Make recommendations to the Budget and Management Director and the Mayor regarding an annual borrowing target for property tax levy-supported borrowing for the Capital Improvements Planning to ensure the budgeted expenditure levels are consistent with the borrowing program.
- Provide recommendations to the Budget and Management Director and the Mayor regarding the appropriate use and levels of non-levy supported borrowing for the enterprise funds and economic development programs.
- Prepare six-year capital improvement plan that includes program or project results, replacement data, and other relevant information. Formulate financing plan that provides a level of debt financing consistent with debt service goals and all other types of capital improvement financing.
- Coordinate development of the proposed capital improvement budget, work with budget analysts to review and analyze capital projects, obtain additional information from departments as needed to review and prioritize projects, develop recommendations and options for capital improvement budget funding for the Budget and Management Director and Mayor.
- Independently review and make field investigations of the Water Department budget. Develop conclusions and recommendations on the department budgetary requests; present and explain such recommendations to the budget director and elected officials. Prepare summarizations, comparative data, budget analysis sheets, and related duties in conjunction with budget preparation and review.
- Make specific recommendations to the Budget and Management Director; summarize results and prepare data on final actions for publication of the Mayor's Proposed Executive Budget.
- Analyze Water Department revenues and work with the department to develop conventional rate cases to the Public Service Commission.
- Performs both short-term and long-term financial, management, and policy studies as assigned.

Job Specific Core Competencies

- **Persuasive Communication:** The ability to plan and deliver oral and written communications that are impactful and persuasive with their intended audiences.
- **Influencing Others:** The ability to gain others' support for ideas, proposals, projects, and solutions.
- **Technical Expertise:** Depth of knowledge and skill in a technical area.
- **Strategic Thinking -** Analyzing an organization's competitive position and developing a clear and compelling vision of what the organization needs for success in the future.
- **Fostering Teamwork:** As a team member, the ability and desire to work cooperatively with others on a team. As a team leader, interest, skill, and success in getting groups to work together cooperatively.

Experience/Education Minimum Requirements

- Requirements include a Bachelor's degree in Public Administration, Economics, Political Science or related field or a related discipline is required. Master's degree in one of the aforementioned fields is preferred.
- Five years of professional experience in municipal budgeting, policy analysis, or key policy development area. Experience should be related to fiscal planning, budget management activities, policy/program analysis, or closely related policy area. Demonstrates ability to provide direction to staff and obtain necessary knowledge in order to perform these functions.

Budget and Policy Manager - Budget Policy and Programs – One PositionBasic Functions

Assists the Budget and Fiscal Policy Operations Manager in directing and managing a team of professional budget analysts in the conduct of budget analysis; budget administration; policy, productivity and management studies; and other analytic tasks related to major policy areas of city government. Primarily responsible for policy direction of major city programs as well as functions and activities throughout the Budget and Management Division. Assists the Budget & Management Director and the Budget and Fiscal Policy Operations Manager in coordinating and managing the overall efforts of the Division. Assume the duties of the Budget and Fiscal Policy Operations Manager in his/her absence. Represents the director before various officials, policy-making bodies, and Common Council committees. Directs and manages certain major administrative activities of the Budget and Management Division.

Duties and Responsibilities

Strategic Planning and Performance Measurement Responsibilities

- Advises and makes recommendations to the Budget and Management Director on all issues related to strategic planning and performance measurement.
- Represents the Budget and Management Director before the Mayor, Common Council Committees, and other City and outside officials and policy-making bodies on strategic planning issues.
- Directs and coordinates the work of several professional budget analysts and special assistants in their analysis of departmental performance measures and strategic plans.
- Serve as a liaison to other governmental units, public interest groups, community organizations, and city departments on matters related to strategic planning and performance measurement.
- Performs other duties as assigned by the Budget and Management Director.

Budget Analysis and Administration Responsibilities

- Assist the Budget and Fiscal Policy Operations Manager in overall budget analysis and development issues. This includes assisting in managing the activities of budget analysts assigned to analyzing matters relating to fiscal strategies and budget summarization.
- Work with Budget and Fiscal Policy Operations Manager to integrate and coordinate fiscal planning; budget development and planning; and strategic planning.
- Independently analyze the annual budgets of two or three departments or funds for administrative and support operations of the city. Independently review and make field investigations of assigned departmental budgets. Interview department and division heads in relation to budgetary requests. Develop conclusions and recommendations on assigned budgetary requests; present and explain such recommendations to the budget director.
- Analyze fund transfer and other funding requests that take place during the budget year and make recommendations on such requests. Analyze requests to fill vacant positions and make recommendations on such requests.
- Assist in preparing citywide budget summarizations as assigned. Prepare summarizations, comparative data, budget analysis sheets, and related duties in conjunction with budget preparation and review. Make specific recommendations to the Budget and Management Director; summarize results and prepare data on final actions for publication.
- Appears before various committees as assigned to support recommendations.

Policy Analysis, Program Evaluation and Fiscal Studies Responsibilities

- Assist Budget and Fiscal Policy Operations Manager in initiating program evaluation and similar studies based upon directives from the Mayor, Common Council and its committees, department heads and the Budget and Management Director.
- Assist Budget and Fiscal Policy Operations Manager in assigning projects to Budget and Management Division staff; establish project priorities; define projects; review and approve project plans and schedules; monitor and review project progress; and review, modify and approve project recommendations and reports.
- As directed, may present and defend project reports and recommendations to the Budget and Management Director, Mayor, Common Council committees, and other officials or policymaking bodies at the direction of the Budget and Management Director.
- As directed, perform particular complex or sensitive projects independently or with the assistance of other Budget and Management Division staff.

Division Administration Responsibilities

- Represent the Budget and Management Director before the Mayor, Common Council and its committees, other City officials and policymaking bodies, and various outside agencies and officials on various Division matters as directed. May assume the duties and responsibilities of the Budget and Fiscal Policy Operations Manager in his/her absence.
- Interview and evaluate job applicants for positions in the division. Recommend to and advise the Budget and Management Director on the employment of job applicants, promotions, demotions, disciplinary and other personnel actions for staff throughout the division.
- Coordinate budget analysis and administration with policy, productivity, management projects alongside other division management staff.
- Plan and provide for the training and development of division staff and, in conjunction with other division management staff, for the general staff development and training for the division.
- Recommend to and advise the Budget and Management Director on planning, personnel, organizational and operational changes and other matters to meet the administrative needs of the division and implement changes as assigned by the director.

Job Specific Core Competencies

- **Persuasive Communication:** The ability to plan and deliver oral and written communications that are impactful and persuasive with their intended audiences.
- **Influencing Others:** The ability to gain others' support for ideas, proposals, projects, and solutions.
- **Technical Expertise:** Depth of knowledge and skill in a technical area.
- **Strategic Thinking -** Analyzing an organization's competitive position and developing a clear and compelling vision of what the organization needs for success in the future.
- **Fostering Teamwork:** As a team member, the ability and desire to work cooperatively with others on a team. As a team leader, interest, skill, and success in getting groups to work together cooperatively.

Experience/Education Minimum Requirements

- Requirements include a Bachelor's degree in Public Administration, Economics, Political Science or related field or a related discipline is required. Master's degree in one of the aforementioned fields is preferred.
- Five years of professional experience in municipal budgeting, policy analysis, or key policy development area. Experience should be related to fiscal planning, budget management activities, policy/program analysis, or closely related policy area. Demonstrates ability to provide direction to staff and obtain necessary knowledge in order to perform these functions.

Another consideration in determining the rates of pay for these new titles includes a review of the cost of labor for similar positions in southeastern Wisconsin. Below are market rates of pay as reported by the Economic Research Institute (ERI), a salary survey to which the city subscribes:

Budget Specialist

Geographic Area	10th Percentile	25th Percentile	Survey Mean	75th Percentile	90th Percentile
West Allis	\$60,026	\$65,719	\$73,212	\$80,568	\$87,937
Waukesha	\$59,951	\$65,640	\$73,127	\$80,477	\$87,838
Racine	\$57,998	\$63,370	\$70,470	\$77,500	\$84,600
Milwaukee	\$59,716	\$65,367	\$72,809	\$80,122	\$87,452
Madison	\$58,288	\$63,467	\$70,318	\$77,120	\$84,002
Kenosha	\$63,357	\$69,647	\$77,888	\$85,902	\$93,850
AVERAGE	\$59,889	\$65,535	\$72,971	\$80,282	\$87,613

ERI describes the responsibilities of a Budget Specialist as: Provides day-to-day financial guidance for departments and organizations, and supports financial reporting and compliance activities. Researches and analyzes existing budgets on both departmental and organizational levels; reviews financial and accounts payable information, identifies areas of concern; and recommends actions to management for final decision making. Develops budgets and cash flow forecasts for organizational budgets and/or departmental budgets, works to ensure that these budget activities align with cash flow expectations and short- and long-term financial plans, and develops forecasts to support long-term budget management and business growth.

Budget Analyst

Geographic Area	10th Percentile	25th Percentile	Survey Mean	75th Percentile	90th Percentile
West Allis	\$70,454	\$77,082	\$85,716	\$94,262	\$102,773
Waukesha	\$70,372	\$76,994	\$85,620	\$94,156	\$102,656
Racine	\$67,851	\$74,161	\$82,455	\$90,735	\$99,040
Milwaukee	\$70,069	\$76,655	\$85,242	\$93,747	\$102,219
Madison	\$67,770	\$73,865	\$81,898	\$89,924	\$97,963
Kenosha	\$74,861	\$82,113	\$91,462	\$100,616	\$109,647
AVERAGE	\$70,230	\$76,812	\$85,399	\$93,907	\$102,383

ERI describes the responsibilities of a Budget Analyst as: Analyzes, advises, and provides technical assistance in preparing budgets. Reviews proposed financial plans for completeness, accuracy, conformance with established procedures, regulations, and organizational objectives. Seeks new ways to improve efficiency and lower costs.

Below are market rates of pay as reported by MRA, a salary survey to which the DER subscribes:

Title	25%	MEDIAN	75%
Financial/Business/Budget Analyst II (Experienced)	\$69,211	\$74,524	\$81,018

MRA defines the responsibilities of this positions as: Advanced level of professional analyst work. The job typically requires a bachelor's degree in business with 5+ years of experience or a master's of business administration and 2+ years of experience, or equivalent. Incumbents work in one or more areas of financial, business or budget analysis under the direction of management. Duties include research, selection, and compilation of financial data from multiple sources, such as sales, production, accounting, public sources or vendors and subsequent analysis of that data to produce business information used to support decisions. Data is often difficult to obtain and may be diluted with unnecessary data points. Identifies questionable data and may then direct others in verifying the accuracy of data. Work assignments are of the greatest difficulty and largest financial impact. Provides work leadership and direction to other professional and clerical staff with respect to project approach and identification of project task.

Title	25%	MEDIAN	75%
Financial/Business/Budget Analyst III (Advanced)	\$80,042	\$93,241	\$101,99

MRA defines the responsibilities of this positions as: Advanced level of professional analyst work. The job typically requires a bachelor's degree in business with 5+ years of experience or a master's of business administration and 2+ years of experience, or equivalent. Incumbents work in one or more areas of financial, business or budget analysis under the direction of management. Duties include research, selection, and compilation of financial data from multiple sources, such as sales, production, accounting, public sources or vendors and subsequent analysis of that data to produce business information used to support decisions. Data is often difficult to obtain and may be diluted with unnecessary data points. Identifies questionable data and may then direct others in verifying the accuracy of data. Work assignments are of the greatest difficulty and largest financial impact. Provides work leadership and direction to other professional and clerical staff with respect to project approach and identification of project task.

Taking into consideration this market data, the four levels of Budget and Fiscal Policy Analyst proposed, and the proposed Budget and Fiscal Policy Manager, this report recommends the following titles and pay rates along with recruitment flexibility to assist the department in recruitment qualified candidates. The proposed minimum recruitment rates for each title are at 25% above the minimum of each pay range to minimize pay compression between the titles.

Title	PR	Rates	Positions
Budget and Fiscal Policy Manager	2MX	PR 2MX (\$75,478 - \$105,669) with recruitment at \$83,026 Recruitment flexibility at any rate with DER approval	Two
Budget and Fiscal Policy Analyst IV	2LX	(\$70,827 - \$99,154) with recruitment at \$77,909 Recruitment flexibility at any rate with DER approval.	Five
Budget and Fiscal Policy Analyst III	2KX	(\$66,435 - \$93,010) with recruitment is at \$73,078 Recruitment flexibility at any rate with DER approval.	Underfill
Budget and Fiscal Policy Analyst II	2JX	(\$62,338 - \$87,270) with recruitment at \$68,571 Recruitment flexibility at any rate with DER approval	Underfill
Budget and Fiscal Policy Analyst I	2IX	(\$58,462 - \$81,844) with recruitment at \$64,308 Recruitment flexibility at any rate with DER approval	Underfill

Implementation of this new series of titles within the Budget and Management Division would be separated into two distinct parts:

- Effective with the implementation date of the report – incumbents will be placed into the title that matches their current pay range and at the same rate of pay currently held. Two exceptions will be for incumbents whose pay must be raised to the minimum rate of pay for the title and pay range into which they will be placed.
- Movement through this series of titles will be based upon periodic assessments by the Budget and Management Director of each incumbent's demonstrated competency level and experience and may result in a recommendation for promotion. This type of promotion is considered a Rule IV-Section 6 promotion under the City Service Commission Rules. These promotion recommendations must be approved by Employee Relations.

The hiring and promotional process for these new titles will remain a part of the City of Milwaukee Civil Service process under the direction of the Department of Employee Relations.

Current	Budget and Management Director	PR 1NX	\$103,841 - \$145,382	One Position
Recommended	Budget and Management Director	PR 1NX	\$103,841 - \$145,382 FN: Recruitment at \$114,226 and may be at any point in the range with the approval of DER and the FPC Chair	One Position

Current	Financial Operations Manager	PR 1KX	\$85,757 - \$120,064	One Position
Recommended	Budget and Fiscal Policy Operations Manager	PR 1LX	\$91,404 - \$127,962 FN: Recruitment is at \$100,543 and may be at any point in the range with the approval of DER and the FPC Chair	One Position

This report also considers the market rates of pay for these top leadership positions in the Budget Division. Below are market rates of pay as reported by ERI for similar positions in southeastern Wisconsin.

Budget Manager

Geographic Area	10th Percentile	25th Percentile	Survey Mean	75th Percentile	90th Percentile
West Allis	\$115,457	\$125,141	\$137,648	\$150,000	\$162,035
Waukesha	\$115,325	\$124,991	\$137,471	\$149,793	\$161,799
Racine	\$109,155	\$118,487	\$130,677	\$142,889	\$155,096
Milwaukee	\$114,843	\$124,481	\$136,923	\$149,216	\$161,232
Madison	\$108,931	\$117,958	\$129,646	\$141,262	\$152,832
Kenosha	\$117,870	\$127,688	\$140,329	\$152,716	\$164,461
AVERAGE	\$113,597	\$123,124	\$135,449	\$147,646	\$159,576

ERI describes the responsibilities of a Budget Manager as: Manages activities of personnel responsible for formulation and presentation of budgets for controlling funds to implement program objectives of an organization. Directs compilation of data based on statistical studies and analyses of past and current years. Develops and manages budgets and justifies funds requested for all departments or divisions of the company. Correlates appropriations for specific programs with appropriations for divisional programs and includes items for emergency funds.

Budget Supervisor

Geographic Area	10th Percentile	25th Percentile	Survey Mean	75th Percentile	90th Percentile
West Allis	\$92,357	\$100,859	\$111,846	\$122,855	\$133,719
Waukesha	\$92,253	\$100,746	\$111,716	\$122,702	\$133,542
Racine	\$88,874	\$97,151	\$107,917	\$118,762	\$129,528
Milwaukee	\$91,849	\$100,313	\$111,249	\$122,202	\$133,010
Madison	\$88,146	\$96,164	\$106,557	\$116,950	\$127,192
Kenosha	\$98,581	\$107,633	\$119,219	\$130,724	\$141,972
AVERAGE	\$92,010	\$100,478	\$111,417	\$122,366	\$133,161

ERI describes the responsibilities of a Budget Supervisor as: Supervises activities of professional level personnel responsible for formulation and presentation of budgets for controlling funds to implement program objectives of an organization. Directs compilation data based on statistical studies and analyses of past and current years. Budgets and

justifies funds requested. Correlates appropriations for specific programs with appropriations for divisional programs and includes items for emergency funds.

Taking into consideration this market data, this report recommends setting the minimum recruitment rate for the Budget and Management Director in Pay Range 1NX (\$103,841 - \$145,382) at \$114,226 with recruitment flexibility at any rate with DER and the Chair of Finance and Personnel approval.

This report recommends retitling the current Financial Operations Manager to Budget and Fiscal Policy Operations Manager to be in line with the new Analyst title series. Taking into consideration the market data above, this report recommends Pay Range 1LX (\$91,404 - \$127,962) with the minimum recruitment rate of \$100,543 with recruitment flexibility at any rate with DER and the Chair of Finance and Personnel approval.

Because the recommendations below are adjustments based upon market rates of pay, incumbents will remain at their current pay rates. There is no fiscal impact with the implementation of these recommendations for these two positions.

Title	PR	Rates	Positions
Budget and Management Director	1NX	(\$103,841 - \$145,382) with recruitment at \$114,226 FN: Recruitment flexibility at any rate with DER and FPC Chair approval	One
Budget and Fiscal Policy Operations Manager	1LX	(\$91,404 - \$127,962) with recruitment at \$100,543 FN: Recruitment flexibility at any rate with DER and FPC Chair approval	One

Action Required - Effective Pay Period 5, 2021 (February 21, 2021)

In the Salary Ordinance

Under Pay Range 1KX:

Delete the title "Financial Operations Manager"

Under Pay Range 1LX:

Add the title "Budget and Fiscal Policy Operations Manager (1) (2)" create and add footnotes:

(1) Recruitment is at:

Biweekly	3,867.04
Annual	100,543.04

and may be at any rate in the range with the approval of DER and the Chair of the Committee on Finance and Personnel.

(2) Recruitment is at:

Biweekly	3,983.05
Annual	103,559.30

and may be at any rate in the range with the approval of DER and the Chair of the Committee on Finance and Personnel

Under Pay Range 1NX:

Create footnotes (4) (8) and add to the title "Budget and Management Director"

(4) Recruitment is at:

Biweekly	4,393.31
Annual	114,226.06

and may be at any rate in the range with the approval of DER and the Chair of the Committee on Finance and Personnel

(8) Recruitment is at:

Biweekly	4,525.11
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Annual	117,652.86
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and may be at any rate in the range with the approval of DER and the Chair of the Committee on Finance and Personnel

Under Pay Range 2IX:

Delete the title of "Budget and Management Special Assistant"

Delete footnotes (1) and (6) in their entirety.

Add the title of 'Budget and Fiscal Policy Analyst I (1) (6)' create and add footnotes:

(1) Recruitment is at:

Biweekly	2,473.38
Annual	64,307.88

and may be at any rate in the range with DER approval.

(6) Recruitment is at:

Biweekly	2,547.58
Annual	66,237.08

and may be at any rate in the range with DER approval.

Under Pay Range 2JX:

Add the title of 'Budget and Fiscal Policy Analyst II (7)(14)' create and add footnotes:

(7) Recruitment is at:

Biweekly	2,637.35
Annual	68,571.10

and may be at any rate in the range with DER approval.

(14) Recruitment is at:

Biweekly	2,716.47
Annual	70,628.22

and may be at any rate in the range with DER approval.

Under Pay Range 2KX:

Delete the title "Fiscal Planning Specialist – Senior"

Add the title of 'Budget and Fiscal Policy Analyst III (7)(14)' create and add footnotes:

(7) Recruitment is at:

Biweekly	2,810.69
Annual	73,077.94

and may be at any rate in the range with DER approval.

(14) Recruitment is at:

Biweekly	2,895.01
Annual	75,270.26

and may be at any rate in the range with DER approval.

Under Pay Range 2LX:

Delete the title "Budget and Policy Manager"

Delete the title "Capital and Debt Specialist"

Add the title of 'Budget and Fiscal Policy Analyst IV (5)(10)' create and add footnotes:

(5) Recruitment is at:

Biweekly	2,996.50
Annual	77,909.00

and may be at any rate in the range with DER approval.

(10) Recruitment is at:

Biweekly	3,086.40
Annual	80,246.40

and may be at any rate in the range with DER approval.

Under Pay Range 2MX:

Add the title of 'Budget and Fiscal Policy Manager (7)(14)' create and add footnotes

(7) Recruitment is at:

Biweekly	3,193.31
Annual	83,026.06

and may be at any rate in the range with DER approval.

(14) Recruitment is at:

Biweekly	3,289.11
Annual	85,516.86

and may be at any rate in the range with DER approval.

In the Positions Ordinance

Under Department of Administration Budget and Management Division

- Delete one position of 'Financial Operations Manager (Y)
- Delete one position of 'Budget and Policy Manager (Y)
- Delete two positions of 'Fiscal Planning Specialist-Senior'
- Delete one position of 'Capital and Debt Specialist'
- Delete three positions of 'Budget and Management Special Assistant'
- Add one position of 'Budget and Fiscal Policy Operations Manager (Y)'
- Add two positions of 'Budget and Fiscal Policy Manager'
- Add five positions of 'Budget and Fiscal Policy Analyst IV'

Prepared by Andrea Knickerbocker
Andrea Knickerbocker, Human Resources Manager



Reviewed by: Makda Fessahaye
Makda Fessahaye, Employee Relations Director