



Department of Administration  
Purchasing Division

Cavalier Johnson  
Mayor

Preston Cole  
Director of Administration

Rhonda U. Kelsey  
City Purchasing Director

April 30, 2024

Harper Donahue, IV, DER Director  
Department of Employee Relations (DER)  
City Hall, 200 East Wells, 7<sup>th</sup> Floor  
Milwaukee, Wisconsin 53202

RE: Request to Exempt, Business Analyst Senior, Enterprise Resource Planning (ERP)

Dear Mr. Donahue:

I am writing to request exempt status of the position of Business Analyst Senior (ERP) from May 2024 through February 27, 2026.

This request is being made to ensure that the selected candidate, Ms. Loretta Gray-Cobb, can retain employee rights to her current position of Program Assistant II in the Department of Public Works (DPW), upon conclusion of the successful implementation of the citywide ERP system.

It is anticipated that the duration of the implementation of the ERP system project will last for approximately two years, through the end of February 2026, and approval of exempt status of this position will provide Ms. Gray-Cobb with assurance that she will remain employed with the City of Milwaukee, upon conclusion of the project. Ms. Gray-Cobb will be joining the DOA-Purchasing Division to backfill the position of the Procurement Manager position who will play a lead role in assisting with the implementation of the City's new ERP system over the next two years.

Thank you for your consideration. If you have questions, please do not hesitate to contact me at 414-286-3639.

Sincerely,

  
Rhonda Kelsey  
City Purchasing Director

Ref: Exec/Payroll/NewHires/Gray-CobbRequestforExemptStatus.doc



**Department of Employee Relations**

**Cavalier Johnson**  
Mayor

**Harper Donahue, IV**  
Director

**Molly King**  
Employee Benefits Director

**Nicole M. Fleck**  
Labor Negotiator

**TO:** Board of City Civil Service Commissioners

**FROM:** Kristin Hennessy Urban  
Human Resources Manager

**DATE:** May 2, 2024

**RE:** Request from the Department of Administration (DOA), Purchasing Division, to exempt the position of Business Analyst – Senior

<u>Position Title</u>	<u># of Positions</u>	<u>Pay Range</u>
Business Analyst – Senior	1	2JX (\$72,768-\$92,612)

Please find attached a request from Purchasing Director Rhonda Kelsey for a one-time exemption for one position of Business Analyst- Senior. A copy of the current job description is attached.

During the next two years, the City will transition to a new Enterprise Resource Planning (ERP) software system, which will integrate the current Human Capital Management (HCM) and Financial Management Information System (FMIS). To augment the staff in departments most impacted by the transition, the Common Council created positions that will sunset when the project is complete, including the Business Analyst – Senior in the Purchasing Division at issue.

Ms. Kelsey is requesting this exemption in order to hire a current Department of Public Works (DPW) employee to support the Purchasing Division's internal processes while other staff members are engaged in the implementation of the new system. Approval of this request would allow the employee, who possesses a unique skill set and knowledge of internal functions, to work in the Purchasing Division for the duration of the project and then return to her former position. Of note, there is a need to fill this position expeditiously, as the work on this project is already underway.

For the reasons cited above, I recommend approval of this request. Please contact me at 414.286.8643 should you have any questions or concerns.

# JOB DESCRIPTION

## FOR DER USE ONLY

### Vacancy No.

City Service  
Commission:  
Fire & Police  
Commission:

Finance  
Committee:  
Common  
Council:

**Instructions:** Complete all sections. Refer to the *Guidelines for Preparing Job Descriptions* for instructions on completing specific items.

1. Date Prepared/ Revised: 04/12/2024		2. Present Incumbent: Delisha Moore		Is incumbent underfilling position? YES <input type="checkbox"/> NO <input checked="" type="checkbox"/> If YES, indicate Underfill Title in box 10.	
3. Date Filled:		4. Previous Incumbent:			
5. Department: Administration, Dept. of			Bureau: Division: Purchasing		Unit: Section: 1513
6. Work Location: City Hall, Room 601			Telephone: 414-286-3508 Email: dmoore@milwaukee.gov		Work Schedule: Hours: 8:00 AM – 4:45 PM / Days: Monday - Friday
7. Represented by a Union? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		8. Bargaining Unit: Non-Mgmt/Non-Rep If in District Council 48, which local?			9. FLSA Status (check one): <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt
10. Official Title: Business Analyst Senior (ERP)				Pay Range	Job Code
Underfill Title (if applicable):				2JX	4290
Requested Title (if applicable):					
Recommended Title (DER Use Only):				Approved by:  Date:	

## 11. BASIC FUNCTION OF POSITION:

The Procurement Manager performs the necessary duties of the City Purchasing Director in his/her absence as directed; administers. Plans, organizes and leads the Procurement Card Program and all major procurement-related initiatives consistent with the Purchasing Division's mission; and supervises and prioritized the workflow of all incoming requisitions and overall office operations. This position will backfill the Procurement Manager for the next two (2) years as the City of Milwaukee undergoes the Enterprise Resource Planning (ERP) Implementation.

## 12. DESCRIPTION OF JOB (Check if description applies to Official Title ☒ or Underfill Title ☐):

### A. ESSENTIAL FUNCTIONS/Duties and Responsibilities: (Refer to the "Guidelines for Preparing Job Descriptions" for instructions on determining Essential Functions.)

% of Time	ESSENTIAL FUNCTION
20%	<ul style="list-style-type: none"> <li>Assist with the management of the daily workflow of Purchasing Agents which includes prioritizing, assigning, and approving requisitions through contract execution; update and maintain internal and external procurement procedures and keep the Purchasing Internal Procedures and Purchasing Liaison Manuals current; and manage all master contract data to include the coordination and statistical reporting of the City's various socio-economical bid incentive programs such as Local Business Enterprise (LBE), Buy American, and Small Business Enterprise (SBE) and the ethical purchasing requirements.</li> </ul>
15%	<ul style="list-style-type: none"> <li>Assist with the management of the Citywide procurement card program; make recommendations on procurement card issues at all levels of City government; and conduct post audits of procurement-related documents for compliance with procedures for internal and external users.</li> </ul>
5%	<ul style="list-style-type: none"> <li>Perform payroll and reporting functions including some involvement with confidential personnel matters for the Purchasing Division; process adjustments to CityTime; create job requisitions in JobApps and prepare related reports as needed.</li> </ul>
40%	<ul style="list-style-type: none"> <li>Review various contract amendments, bids, and exception to bids for compliance with procurement procedures and state and local laws; serve as the department webmaster and ensure both internal and external websites are maintained and up to date; assist with the Citywide petty cash program; work with City departments on creating, modifying or dissolving accounts and annual reconciliations; and perform duties of the Administrative Specialist Senior and Program Assistant II on a backup basis.</li> </ul>
20%	<ul style="list-style-type: none"> <li>Assist with coordination and developing Citywide Financial Management Information System (FMIS) training and annual purchase order/budgetary rollover duties.</li> </ul>

The above statements are intended to summarize the nature and level of work and typical responsibilities and duties being performed by the incumbent(s) of this job. They are not intended to be an exhaustive list of all responsibilities, duties, and tasks required of the position.



% of Time	ESSENTIAL FUNCTION
	•

**B. PERIPHERAL DUTIES:**

% of Time	PERIPHERAL DUTY
	•
	•

**C. NAME AND TITLE OF IMMEDIATE SUPERVISOR:**

Rhonda Kelsey; City Purchasing Director

**D. SUPERVISION RECEIVED:** (Describe the extent to which work assignments and methods are outlined, reviewed, and approved by this position's supervisor.)

Minimal supervision received. Projects identified and prioritized in consultation with the Purchasing Director in an effort to establish goals and objectives of the Division.

**E. SUPERVISION EXERCISED:**

Total number of employees for whom responsible, either directly or indirectly = 0.

**Direct Supervision:** List the number and titles of personnel directly supervised. Specify the kind and extent of supervision exercised by indicating one or more of the following:

of supervision exercised by indicating one or more of the following:		
a. Assign duties	e. Sign or approve work	
b. Outline methods	f. Make hiring recommendations	
c. Direct work in progress	g. Prepare performance appraisals	
d. Check or inspect completed work	h. Take disciplinary action or effectively recommend such	
<b>Number Supervised</b>	<b>Job Title</b>	<b>Extent of Supervision Exercised</b> <i>(Select those that apply from list above, a - h)</i>

**F. MINIMUM QUALIFICATIONS REQUIRED:** (Indicate the MINIMUM qualifications required to enter the job.)

Minimum qualifications include a bachelor's degree in business administration, finance or related area and two years of management experience. A master's degree is desirable. Equivalent combinations of education and experience may be considered.

i. Education and Experience:

A bachelor's degree in business administration, finance or related area and two years of management experience. A master's degree is desirable. Thorough knowledge of purchasing law and procedures is required.

ii. Knowledge, Skills and Abilities:

Demonstrable ability to analyze numerical data and draw conclusions from the same.

Ability to recognize trends or changes. Uses accurate logic in analysis.

Extensive knowledge of general personal computer applications for word processing, spreadsheets, and databases.

Demonstrable experience working in a customer service environment required.

Ability to independently prioritize responsibilities and assignments to meet organizational goals required.

Excellent communication and presentation skills required. Marketing and promotions experience.

Experience conducting training sessions.

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Proven ability to work with diverse teams/departments.

Excellent consultative and communication skills, analytical ability, strong judgment and management skills, and the ability to work effectively with senior management, departmental representatives, and purchasing personnel.

Ability to organize, manage, and lead assigned staff.

iii. Certifications, Licenses, Registrations:  
N/A

iv. Other Requirements:  
N/A

### 13. PHYSICAL AND ENVIRONMENTAL DEMANDS: TOOLS AND EQUIPMENT USED

The Americans with Disabilities Act (ADA) of 1990, as amended by the Americans with Disabilities Act Amendments Act (ADAAA) of 2008 requires job descriptions to provide detailed information regarding the physical demands required to perform the essential functions of a job; the conditions under which the job is performed; and the tools and equipment the employee will be required to use on the job. Reasonable accommodations may be made to enable qualified individuals to perform the essential duties and responsibilities of the job for each of the categories listed below.

**G. PHYSICAL ACTIVITY OF THE POSITION:** (List the physical activities that are representative of those that must be met to successfully perform the essential functions of the job).

#### **CHECK ALL THAT APPLY:**

<input type="checkbox"/>	<b>Climbing:</b> Ascending or descending ladders, stairs, scaffolding, ramps, poles, and the like; using feet and legs and/or hands and arms. Body agility is emphasized. Check only if the amount and kind of climbing required exceeds that required for ordinary locomotion.
<input type="checkbox"/>	<b>Balancing:</b> Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. Check only if the amount and kind of balancing exceeds that needed for ordinary locomotion and maintenance of body equilibrium.
<input type="checkbox"/>	<b>Stooping:</b> Bending body downward and forward by bending spine at the waist. Check only if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.
<input type="checkbox"/>	<b>Kneeling:</b> Bending legs at knee to come to a rest on knee or knees.
<input type="checkbox"/>	<b>Crouching:</b> Bending the body downward and forward by bending leg and spine.
<input type="checkbox"/>	<b>Crawling:</b> Moving about on hands and knees or hands and feet.
<input checked="" type="checkbox"/>	<b>Reaching:</b> Extending Hand(s) and arm(s) in any direction.
<input type="checkbox"/>	<b>Standing:</b> Particularly for sustained periods of time.
<input type="checkbox"/>	<b>Walking:</b> Moving about on foot to accomplish tasks, particularly for long distances.
<input type="checkbox"/>	<b>Pushing:</b> Using upper extremities to exert force in order to draw, press against something with steady force in order to thrust forward, downward or outward.
<input type="checkbox"/>	<b>Pulling:</b> Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.
<input type="checkbox"/>	<b>Lifting:</b> Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. Check only if it occurs to a considerable degree and requires substantial use of the upper extremities and back muscles.
<input type="checkbox"/>	<b>Fingering:</b> Picking, pinching, typing or otherwise working primarily with fingers rather than with the whole hand or arm, as in handling.
<input type="checkbox"/>	<b>Grasping:</b> Applying pressure to an object with fingers and palm.
<input type="checkbox"/>	<b>Feeling:</b> Perceiving attributes of objects such as size, shape, temperature or texture by touching with the skin, particularly that of the fingertips.
<input checked="" type="checkbox"/>	<b>Talking:</b> Expressing or exchanging ideas by means of the spoken word. Those activities which demand detailed or important instructions spoken to other workers accurately, loudly or quickly.
<input checked="" type="checkbox"/>	<b>Hearing:</b> Perceiving the nature of sounds with no less than a 40 db loss. Ability to receive oral communication and make fine discriminations in sound.
<input checked="" type="checkbox"/>	<b>Repetitive Motions:</b> Substantial movements (motions) of the wrist, hands, and/or fingers.

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<input type="checkbox"/>	<b>Driving:</b> Minimum standards required by State Law (including license).
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**H. PHYSICAL REQUIREMENTS OF THE POSITION:** (List the physical requirements that are essential functions of the job.)

**CHECK ONE:**

<input checked="" type="checkbox"/>	<b>Sedentary Work:</b> Exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
<input type="checkbox"/>	<b>Light Work:</b> Exerting up to 10 pounds of force occasionally and/or negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for sedentary work and the worker sits most of the time, the job is rated for Light Work.
<input type="checkbox"/>	<b>Medium Work:</b> Exerting up to 50 pounds of force occasionally and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
<input type="checkbox"/>	<b>Heavy Work:</b> Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
<input type="checkbox"/>	<b>Very Heavy Work:</b> Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

**I. VISUAL ACUITY REQUIREMENTS:** (List the visual acuity requirements that are essential functions of the job.)

**CHECK ONE:**

<input checked="" type="checkbox"/>	<b>Operators (Electronic Equipment), Inspection, Close Assembly, Clerical, Administrative:</b> This is a minimum standard for use with those whose job requires work done at close visual range (i.e. preparing and analyzing data and figures, accounting, transcription, computer terminal, extensive reading, visual inspection involving small parts, operation of machines, using measurement devices, assembly or fabrication of parts).
<input type="checkbox"/>	<b>Machine Operators, Mechanics, Skilled Tradespeople:</b> This is a minimum standard for use with those whose work deals with machines where the seeing job is at or within arm's reach. This also includes mechanics and skilled tradespeople and those who do work of a non-repetitive nature such as carpenters, technicians, service people, plumbers, painters, mechanics, etc. (If the machine operator also inspects, check the "Operators" box.)
<input type="checkbox"/>	<b>Mobile Equipment Operators:</b> This is a minimum standard for use with those who operate cars, trucks, forklifts, cranes, and high lift equipment.
<input type="checkbox"/>	<b>Other:</b> This is a minimum standard based on the criteria of accuracy and neatness of work for janitors, sweepers, etc.

**J. THE CONDITIONS THE WORKER WILL BE SUBJECT TO IN THIS POSITION:**

List the environmental/working conditions to which the employee may be exposed while performing the essential functions of the job. Include scheduling considerations such as on-call for emergencies, rotating shift, etc. **Approximate Percentage of time performing field work:** \_\_\_\_\_%

**CHECK ALL THAT APPLY:**

<input checked="" type="checkbox"/>	<b>None:</b> The worker is not substantially exposed to adverse environmental conditions (such as typical office or administrative work).
<input type="checkbox"/>	<b>The worker is subject to inside environmental conditions:</b> Protection from weather conditions but not necessarily from temperature changes (i.e. warehouses, covered loading docks, garages, etc.)
<input type="checkbox"/>	<b>The worker is subject to outside environmental conditions:</b> No effective protection from weather.
<input type="checkbox"/>	<b>The worker is subject to extreme cold:</b> Temperatures below 32 degrees for period of more than one hour.
<input type="checkbox"/>	<b>The worker is subject to extreme heat:</b> Temperatures above 100 degrees for periods of more than one hour.
<input type="checkbox"/>	<b>The worker is subject to noise:</b> There is sufficient noise to cause the worker to shout in order to be heard above the surrounding noise level.
<input type="checkbox"/>	<b>The worker is subject to vibration:</b> Exposure to oscillating movements of the extremities or whole body.
<input type="checkbox"/>	<b>The worker is subject to hazards:</b> Includes a variety of physical conditions, such as proximity to moving mechanical parts, electrical current, working on scaffolding and high places or exposure to chemicals.
<input type="checkbox"/>	<b>The worker is subject to atmospheric conditions:</b> One or more of the following conditions that affect the respiratory system or the skin: Fumes, odors, dust, mists, gases or poor ventilation.
<input type="checkbox"/>	<b>The worker is subject to oil:</b> There is air and/or skin exposure to oils and other cutting fluids.
<input type="checkbox"/>	<b>The worker is required to wear a respirator.</b>

**K. MACHINE, TOOLS, EQUIPMENT, ELECTRONIC DEVICES, SOFTWARE, ETC. USED BY POSITION:**

List equipment needed to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential

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functions.)

**CHECK ALL THAT APPLY:**

<input type="checkbox"/> Camera and photographic equipment	<input checked="" type="checkbox"/> Office Equipment (desk, chair, telephone, etc.)
<input type="checkbox"/> Cleaning supplies	<input checked="" type="checkbox"/> Office supplies (pens, staplers, pencils, etc.)
<input type="checkbox"/> Commercial vehicle	<input checked="" type="checkbox"/> Packing materials (boxes, shrink wrap, etc.)
<input type="checkbox"/> Data processing equipment	<input checked="" type="checkbox"/> PC equipment (monitor, keyboard, printer, etc.)
<input type="checkbox"/> Handcart	<input checked="" type="checkbox"/> PC software
<input type="checkbox"/> Hand tools <i>(please list)</i> :	
<input checked="" type="checkbox"/> Office Machines <i>(check all that apply)</i> : <input checked="" type="checkbox"/> Copier <input type="checkbox"/> Facsimile <input checked="" type="checkbox"/> Calculator <input type="checkbox"/> Cash register	
<input type="checkbox"/> Other <i>(please list)</i> :	

- L. **SUPPLEMENTARY INFORMATION:** (Indicate any other information which further explains the importance, difficulty, or uniqueness of the position, such as its scope of responsibility related to finances, equipment, people, information, etc. Also indicate success factors such as personal characteristics that contribute to an individual's ability to perform well in the job, and any other special considerations.)

- M. I believe that the statements made above in describing this job are complete and accurate.

 04.18.2024  
\_\_\_\_\_  
Signature of Department Head or Designated Representative

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