

TO: Personnel Board

FROM: Julie Trimbell, Human Resources

DATE: January 27, 2023

SUBJECT: Planner – Planning Division

The Human Resources Department received a request from Planning Division Director Heather Stouder and Transportation Planning Manager Bill Schaefer on November 30, 2022 to study the 1.0 FTE position #3655 of Planner 2 (CG 18, Range 8), currently filled by Colleen Hoesly, to determine if the position is properly classified based on the current job responsibilities assigned to the position. Upon reviewing the updated and prior position descriptions, the current class specification, and conducting interviews with Bill and Colleen, I recommend recreating the position as a Planner 3 in CG18, Range 10 and reallocating the employee to the new position.

Position #3655 is part of the federally required Greater Madison Metropolitan Planning Organization (MPO), which is responsible for cooperative, comprehensive regional transportation planning and decision making for the Madison Metropolitan Planning Area. Colleen was hired into this position in 2017 and soon after became a Planner 2.

The Planner 2 class specification describes...

...**advanced level** of the professional planner career progression series. Employees exercise expertise in the design and completion of diverse assignments consistent with the Planning Division and MATPB Work Plans and effectively participate in policy formulation. This work is characterized by acquired expertise in the development and application of urban land use, community development, and transportation plans, strategies and standards, **progressive experience** with complex projects and project management, increased effectiveness with written and verbal communication to a wide variety of audiences, and coordination of internal process improvements as assigned. Work is performed under general supervision. [emphasis added]

Over the past few years, Colleen took on additional responsibilities to include project management and leadership roles within MPO. She served lead roles in several major projects, including the Long Range Regional Transportation Plan, the Congestion Management Process, Transportation Performance Management Process, the Public Involvement Plan, the Regional Safety Action Plan, and the Traffic Safety Program, which is a new program she developed. These projects involve scoping, complex analysis, developing strategies, working with external partners, policy updates, coordinating focus groups, conducting surveys, providing recommendations, grant work, preparing resolutions, and reporting. Colleen also serves as primary staff support to the Technical Coordinating Committee where she is responsible for developing the agendas, preparing materials, and assistance in running the meetings. She assists in this capacity with the Policy Board as well. She also coordinates the work of other staff and supervises interns. Colleen has also increasingly assisted the MPO Manager in managing the activities of the MPO, including

formulating policies and providing strategic direction for the agency, developing and maintaining the Work Program, developing performance measures for the Performance Management process, and ensuring compliance with federal rules. This work aligns with the Planner 3 class specification, which describes...

...**senior level work** characterized by accountability for complex activities in the Planning Division or MATPB Work Plans necessitating initiative, judgment, and discretion. Planners at this level have ongoing responsibility for one or more planning activities, strong and proven project management capabilities for team-based projects and programs, and often serve as **lead staff** for City or MATPB committees. Under general supervision, work requires a **high degree of independence**, and typically involves **leadership** in program, plan, and policy development and internal process improvements. [emphasis added]

The duties and responsibilities of the Planner 3 that differentiate it from the Planner 2 are:

Planning and Policy Formation

- Administer and take a lead role in ongoing and substantive planning program(s), e.g. comprehensive planning, subarea planning, preservation planning, development review, transportation planning, and/or other similar level programs and projects.
- Develop multi-faceted plans and strategies to achieve program objectives within policy parameters. Conduct complex and discretionary analysis of various planning issues and initiatives.
- Plan, schedule and conduct work sessions, public meetings, and other outreach strategies as necessary to accomplish program objectives.
- Attend and present as needed at public meetings related to the formation and adoption of plans and policies.

Project Management and Leadership

- Provide leadership through the initial scoping, management, and completion of complex planning processes, projects, and planning efforts.
- Prepare resolutions to guide planning processes and other Planning Division projects.
- Effectively lead staff teams and manage projects involving contributions from Planning Division colleagues, interagency staff, interns, and consultants.
- Provide primary staff support to policy review bodies; and coordinate/facilitate administrative considerations to implement decisions.
- Manage and administer grant programs.
- Mentor newer employees and supervise and/or contribute to the work plans and supervision of Planning Division interns.
- Assist in the development and maintenance of internal systems to track progress toward Work Plan activities.
- Assist Principal Planners, Transportation Planning Manager and the Planning Division Director as needed.

As this position has evolved over time and has taken on higher level work with project management and leadership roles within MPO, it is appropriate that it be placed at the level of Planner 3. As a result, I recommend recreating position #3655 as a Planner 3 in CG 18, Range 10 and reallocating the employee to the new position, within the Planning Division budget.

The necessary resolution to implement this recommendation has been drafted.

Editor’s Note:

Effective Date: 12/11/2022

Compensation Group/Range	2023 Annual Minimum (Step 1)	2023 Annual Maximum (Step 5)	2023 Annual Maximum +12% longevity
18/08	\$68,320	\$81,073	\$90,802
18/10	\$74,162	\$89,130	\$99,825

- cc: Matt Wachter - Department of Planning, Community and Economic Development Director
- Heather Stouder – Planning Division Director
- Bill Schaefer – Transportation Planning Manager