

TO: Personnel Board
FROM: Victoria Larson, Human Resources
DATE: May 6, 2022
SUBJECT: Housing Operations Analyst

The Director of Planning, Community and Economic Development (PCED), Matt Wachter and Housing Operations Program Manager, Larry Kilmer requested the position of Housing Operations Analyst (Position #1027), currently classified in CG 18, R 8 and occupied by Lisa Daniels, be reviewed through the position study process. This position supervises the housing eligibility section, which includes an Administrative Analyst 2, an Administrative Supervisor and a Hearing and Accommodation Specialist. After review of the updated position description, and upon meeting with the supervisor and employee, I recommend the current Housing Operations Analyst classification be recreated in CG 18, R 12, that position #1027 be recreated in the new range, and the employee be reallocated to the new position for the reasons outlined below.

Lisa Daniels started her career with the City in 2003 as a Program Assistant 3 for the Community Development Authority (CDA) Housing. In this role Lisa worked as the administrative support to the Housing Operations Program Manager and supervised the Housing front desk staff and eligibility functions for the Low-Income Public Housing program. In 2007, Lisa started working on policy development, became responsible for a complex payroll process, began gathering data required by Housing and Urban Development (HUD) and began supervising Admissions and Eligibility staff for Section 8 program efforts. In 2016, Lisa again took on more responsibility in the areas of research and policy writing, creating narratives for HUD reports and added procurement work. This resulted in Lisa being reclassified to a Housing Operations Analyst in 2017. With the management of public housing becoming increasingly more complex, Lisa's position evolved to more administrative office and financial management work.

In 2017 Lisa added CDA Housing asset management work and IRS tax credit compliance duties. This work involves contract administration, financial management, Request for Proposal (RFP) processing, and the ability to work with CDA's various property managers to resolve concerns. This work also involves coordinating and working with banks and investors. In this role Lisa worked with the City Attorney's Office to create property management contracts and Lisa developed risk assessment mechanisms. Additionally, Lisa works with property managers to ensure investors are eligible for their tax credit and created a property management transition plan which assists with the transition process when a new property management company takes over housing units. This tax compliance work required Lisa to obtain a tax credit certification which she maintains with continuing education.

In March of 2020, the Hearing and Accommodations Specialist position was created and placed under Lisa's supervision. This work involves applicant and Section 8 participant hearings, accommodations, and Public Housing grievance hearings. Lisa obtained a Reasonable Accommodations Specialist certification, set up a process for hearings and accommodations, and a related handbook to outline these processes. Additionally, an Admissions and Eligibility Supervisor was created in 2020 along with an Administrative Analyst 2 in CG18, R 8. Lisa has worked on dispositioning of 33 units of public housing property. Lisa

works with various units of CDA and the respective boards, HUD, and City Real Estate to sell property which later is converted to affordable housing. This is a process that involves Lisa working as a project manager. This process requires an understanding of related HUD regulations, project management, leadership, and the ability to appropriately transition property management.

For the purpose of this study, I reviewed the classifications in CG18, R 8 through CG18, R 12. Through my discussions with Matt Wachter and review of the Real Estate Development Specialist 3 classification (CG18, R10), I noticed similarities to Lisa Daniels' current position. Both positions require project management skills, and a strong understanding of property management. However I also noticed some differences between the positions. My interviews revealed that the Real Estate Development Specialist 3 currently manages one property while Lisa, with the assistance of the Administrative Analyst 2, manages 4 housing properties. This adds to the position's budgetary responsibility and adds to tax credit complexities, and requires the understanding of HUD and IRS regulations. Also the Real Estate Development Specialist 3 does not supervise any staff.

Lisa currently supervises 3 professional positions and one administrative position - an Administrative Analyst 2, an Admissions and Eligibility (Administrative) Supervisor, a Hearing and Accommodations Specialist, and a Program Assistant 1. This results in oversight of administrative, financial, and hearing and accommodations functions of CDA Housing. Additionally with the current structure, Lisa manages the front desk administrative supervisor who oversees two Information Clerks and one Eligibility Coordinator. Lastly, it is important to note that Lisa is currently supervising the Administrative Analyst 2 (CG18, R8) who is currently classified in the same compensation group and range as Lisa. Given this information I found it was appropriate to review the ranges above CG18, R10.

When reviewing positions in CG18, R12 I specifically reviewed the classifications of Asset Manager 2, Parks Financial and Administrative Coordinator, and the Housing Inspector Supervisor. The Asset Manager 2 classification states:

....Employees at this level are consistently assigned to **projects with major financial and policy-level implications**, incorporating **complex long-term planning** considerations, and the **coordination of inter-agency group efforts**. **Work is performed with considerable independence** in areas where there are often **not clear policy/procedural parameters**. Work includes providing **leadership, advice and consultation to leadership within the agency**. Work is performed under the general supervision. (emphasis added)

Lisa oversees asset management for CDA Housing. Lisa's work unit manages millions of dollars for CDA Housing and hundreds of public housing units. This oversight requires an understanding of complex HUD regulations and the ability to work with HUD to create new work processes. This also requires an understanding of how to incorporate CDA Housing's and HUD's long term public housing goals. Lisa worked to develop improved contracting methods, works to ensure tax credit compliance is met, developed an improved RFP process, and has developed a risk assessment to help evaluate property managers. This work requires Lisa to act as a leader over multiple projects where she works with internal agencies and citywide partners. Lisa has performed these duties with a high level of independence, expertise, and proven ability to lead complex, long-term planning initiatives.

Lisa's position is also comparable to the Parks Financial and Administrative Coordinator. Parks Financial and Administrative Coordinator assists in the development, coordination, and management of the Parks Division's financial programs, administrative services, and policy development and analysis. They both

supervise teams which have significant responsibility over their respective agencies budgets and financial management, coordinate Human Resources personnel related and payroll functions, and manage other administrative related tasks for their agencies. In addition, they both develop policies to help administer their function areas and analysis policy effectiveness. Finally, Lisa's position is similar to the Housing Inspection Supervisor in that they both supervise similar size teams and multiple programmatic functions. The programs managed require the understanding of complex laws and regulations, as well as the ability to manage programs which operate within these laws by using standard criteria to evaluate eligibility/compliance. Both these positions establish and maintain policies, procedures, and quality standards, to ensure uniform processes and efficient operations.

Based on the analysis outlined above, Lisa has not only taken on additional complex work in multiple areas, but has also demonstrated the ability to manage this work and the work of others in the unit with a high degree of independence and initiative. Therefore, I recommend the classification of Housing Operations Analyst be recreated in CG18, R12, and position #1027 should be recreated in the new range, with the employee reallocated to the new position. Finally, this reclassification will allow Lisa to be placed in a higher classification than an employee she currently supervises and more appropriately recognizes the different levels of responsibility between these two roles.

The necessary resolution to implement this recommendation has been drafted.

Effective Date: 7/12/2020

Editor's Note:

Compensation Group/Range	2022 Annual Minimum (Step 1)	2022 Annual Maximum (Step 5)	2022 Annual Maximum (+12% Longevity)
18/8	\$66,648.14	\$79,088.88	\$88,579.66
18/12	\$79,088.88	\$95,481.10	\$106,938.78

Cc: Matt Watcher - Director of Planning and Economic Development
Larry Kilmer – Housing Operations Program Manager
Lisa Daniels – Housing Operations Analyst
Harper Donahue, IV – Human Resources Director
Emaan Abdel-Halim - HR Services Manager