

TO: Personnel Board

FROM: Julie Trimbell, Human Resources

DATE: June 1, 2012

SUBJECT: Administrative Analyst Reclassification

At the request of Finance Director David Schmiedicke and Budget and Audit Manager Debra Simon, I have studied the position (#774) of Administrative Analyst 2 (CG18, Range 08) currently occupied by Elizabeth York. This position works in the Budget & Audit Services area of the Finance Department. Ms. York's position is a hybrid position, which includes auditing and budgetary duties. In addition, Ms. York has taken a leadership role within the audit function. Ms. Simon and Ms. York have both been interviewed regarding this position. Based on these two meetings and a review of the position descriptions (attached), it is recommended the position should be recreated as Administrative Analyst 3, CG18/10, and the incumbent should be reallocated to the new position.

Ms. York has worked in the Finance Department since 2007, and became an Administrative Analyst 2 in February 2010. Ms. York initially began performing some Administrative Analyst 2 level responsibilities as early as the summer of 2009 and over time her responsibilities have increased to include the assignment of additional agencies, more complex duties and a leadership role.

The Administrative Analyst 2 class specification (attached) outlines:

*...journey-level professional analytic work primarily in the areas of economic, financial and policy analysis, and in the development and administration of City agency budgets within the City Comptroller's Office. Work is performed independently within applicable policy and procedural guidelines. Employees are assigned varied and responsible analytic activities and prepare substantive study recommendations for policy body consideration. Work is performed under the general supervision of the Budget and Audit Manager.*

Whereas, the Administrative Analyst 3 class specification (attached) describes:

*...responsible advanced-level professional analytic work primarily in the areas of economic, financial and policy analysis, and in the development and administration of City agency budgets within the City Comptroller's Office. Work is performed with a high degree of independence within applicable policy and procedural guidelines and may involve self-initiated work consistent with the needs of the organization. Employees are assigned varied and responsible analytic activities and prepare substantive study recommendations for policy body consideration. Work may include providing leadership, advice, and consultation to subordinates, on a project basis. Work is performed under the general supervision of the Budget and Audit Manager.*

The Training & Experience for Administrative Analyst 3 requires:

*Two years of directly related journey level professional analytic experience comparable to that gained as an Administrative Analyst 2, with the City of Madison. Such experience will normally*

*be gained after graduation from an accredited four-year college with a major in business administration, public administration, economics or a related field.*

Ms. York's position currently provides budget development and analysis for the following City agencies: Common Council, Municipal Court, Information Technology (including Madison City Channel), Human Resources, Water Utility, CDA Housing Operations, Stormwater Utility, and Facilities Management capital budget. She also acquired responsibility for the Bicycle and Pedestrian capital budget beginning in May 2011. The Water Utility and Stormwater Utility budgets include enterprise funds due to generating revenue and are self-sustaining. Because of this, they are very complex and require greater analysis to include rate determination. Ms. York provides briefings to the Mayor on all these budget agencies.

Ms. York is also responsible for preparing debt service schedules, which was a function of the former Comptroller (Finance Director). The debt service projections forecast what the City will pay in debt service in future years based on projected borrowing for capital projects at any particular time in the decision making process. This allows decision makers to fully understand the impact of their capital budget decisions on the operating budget. Since early summer 2011, Ms. York has taken over this responsibility, which is performed annually, as well as on an as needed basis. Overall, this responsibility accounts for approximately 5-7% of her work time.

In 2011, Ms. York began taking more leadership responsibilities over an Accountant 1 performing auditing duties. Her current responsibility includes coaching, overseeing and assigning tasks, monitoring work progress, following up, reviewing work, and providing feedback and training. Throughout the year, this accounts for approximately 15% of her time.

Ms. York now spends a great deal more time advising agencies than was spent initially. She evaluates agency requests, conducts interviews, supplies background information, and provides recommendations. This has been especially true with turnover and as new Department staff is hired.

Ms. York has also served as a staff member on several committees including: a member of the 2010 City Channel Advisory Committee in which City Channel was placed under the Information Technology Department; an annual member of the Rhythm & Booms Planning Team; and a member of the 2011 RFP Committee for Water Utility, which included a major update of electronic monitoring of meters.

As previously outlined, Ms. York is performing responsible advanced-level professional analytic work including leadership responsibilities. In addition, Ms. York meets the Training and Experience requirements for Administrative Analyst 3. As such, Ms. York's position should be recreated as an Administrative Analyst 3 (CG18, R10) and she should be reallocated to the new position.

The necessary Resolution has been prepared to implement this recommendation.

Editor's Note:

Compensation Group/Range	2012 Annual Minimum (Step 1)	2012 Annual Maximum (Step 5)	2012 Annual Maximum +12% longevity
18/08	\$53,878	\$63,935	\$71,604
18/10	\$58,485	\$70,288	\$78,728

cc: David Schmiedicke - Finance Director  
Debra Simon –Budget and Audit Manager  
Elizabeth York – Administrative Analyst 2