

TO: Personnel Board  
FROM: Harper Donahue, Human Resources  
DATE: September 17, 2012  
SUBJECT: Housing Site Managers

At the request of the Housing Operations Program Manager, Mr. Agustin Olvera, I have studied the classification of Housing Site Manager (CG18/R07, positions #1018, #1012, & #1028), currently occupied by Ms. June Garvin, Ms. Sally Hanks, and Ms. Elizabeth Yszenga. These positions are currently housed within the Community Development Authority-Housing Operations Unit, and report directly to Mr. Olvera. I have met with Mr. Olvera and the current incumbents twice, and based on these meetings, a review of the position description (attached) and supplemental written information provided by the Site Managers, a review of several comparable positions, and the City of Madison Personnel Rules, I recommend that the Housing Site Manager classification be moved to CG18/R08, and the individuals reallocated to the new range for reasons outlined in this memo.

Recent changes in reporting and programmatic requirements imposed by the Department of Housing and Urban Development (HUD) triggered the request for this position study as these changes have led to an increase in the duties and responsibilities of the incumbents (Garvin, Hanks, and Yszenga). The Housing Site Manager class spec (attached) identifies

*"...responsible supervisory and administrative work in directing the operations and services of federally subsidized housing programs/facilities. Work involves developing and maintaining effective tenant relations, coordinating centralized facility maintenance and administrative activities, and administering directly-related housing programs. Work is performed under the general supervision of the Housing Operations Unit Director."*

Specific responsibility may include

- *Develop and maintain effective tenant relations. Review applicant information and recommend resident admission. Facilitate timely occupation. Conduct lease orientation, and provide for administrative considerations (e.g., pre-occupancy inspections, security deposits, etc.). Oversee tenant service programs and activities to foster responsible tenancy. Enforce lease provisions. Receive complaints; gather information, and conduct pertinent investigation(s); inform, advise, warn tenant of violations; document as appropriate. Coordinate rent collection. Prepare and issue lease termination notices. Participate in tenant grievance conference and hearings. Coordinate eviction processes. Coordinate tenant vacate activities. Work closely with legal counsel; appear in court as CDA witness.*
- *Supervise program administrative staff. Hire, train, assign monitor, coach and counsel staff. Provide for effective employee relations. Conduct/participate in staff meetings. Administer housing monitor and caretaker contracts. Coordinate the provision of external services., e.g., central maintenance activities, police contract security, etc. Work with centralized maintenance staff to maintain curb appeal and resident satisfaction.*
- *Oversee/conduct annual tenancy review process to establish applicable lease conditions. Oversee/conduct interim reviews as applicable. Oversee/conduct apartment inspections.*

- *Monitor and facilitate timely rent payments. Establish financial obligations relative to facility damage and establish repayment plan.*
- *Provide for housing program administration consistent with funding standards, and other controlling regulations and standards. Maintain effective public relations. Prepare detailed statistical and narrative reports through the use of required PC's, software and the use of HUD required software and database records maintenance. Recommend and administer program budgets within established guidelines. Maintain effective liaison with other City agencies, contractors, and community action organizations. Develop work plans and operating procedures consistent with policies.*

It is very clear that the Housing Site Manager position is intended to have “supervisory and administrative responsibilities in regards to directing the operations and services of federally subsidized housing programs/facilities.” At the CG18/R07 level, this classification is expected to comply with various regulations, such as HUD, which entails data reporting, and adherence to established performance standards. This study therefore focuses on recent programmatic changes which may require the subjects of this study to perform work beyond that described in their current class specifications, and if so, the identification of the appropriate salary range for this position.

#### Recent Changes to the Housing Site Manager Position:

- **Occupancy Requirements:** HUD has adopted a “business approach” to public housing and requires increased attention to operational efficiency with an emphasis on maintaining higher occupancy rates, going from a 97% to 98% occupancy rate. This requires Site Managers to maintain a close relationship with maintenance staff and contractors to minimize unit downtime, and to also maintain a close contact with the Central office to ensure proper wait list usage.
- **Monthly and Annual Reporting Requirements:** HUD has increased monitoring via electronic data. Several recently created databases require additional data entry, and the use of several different software systems. These newly created software systems are not necessarily compatible with City or CDA software, this creates greater complexity when maintaining and monitoring required data.
- **CDA inspections:** Frequency was previously every three years, recently inspections have occurred annually. Failure to score well during inspections can affect HUD funding.
- **HUD mandated Asset Management Plan:** This requires a decentralization of maintenance responsibilities, forcing the City to return to a decentralized maintenance process which requires Site Managers to absorb many responsibilities that were recently fulfilled by the Housing Maintenance Supervisor (CG18/R08). Previously, the Housing Maintenance Supervisor provided, “responsible supervisory work in planning, directing, coordinating, and evaluating the overall maintenance and repair of the facilities, grounds and equipment of all Community Development Authority public housing units.” Under this plan, Site Managers also assume greater levels of responsibility for certain aspects of their respective budgets.
- **Redevelopment Responsibilities:** As sites undergo redevelopment, Site Managers are expected to deal with contractors when problems arise, previously a responsibility of the Housing Maintenance Supervisor. During redevelopment, Site Managers are also expected to assist residents with relocations.

The 3 incumbents in question have an equivalent level of responsibility. For instance, all three positions are required to maintain awareness of HUD regulations and updates, and make changes to City operations at their respective sites in response to frequent changes in HUD

regulations and requirements. This is done in consultation with Mr. Olvera, the Housing Operations Program Manager. Proper implementation of HUD standards is critical to the City's ability to avoid additional monitoring requirements, and failure to properly implement and comply with standards could lead to a loss of funding and/or funding opportunities.

In reviewing recent changes to the duties and responsibilities of the incumbents, I find that is appropriate to adjust the Housing Site Manager classification. As noted earlier, the Housing Site Manager is responsible for providing, *"responsible supervisory and administrative work in directing the operations and services of federally subsidized housing programs/facilities."* While it appears that there has been a significant increase in the workloads of the Housing Site Managers – it appears that there has only been a slight increase in the *"level"* of the work being performed. After meeting with the incumbents, reviewing comparable classifications in Housing and other City departments, which would be impacted by this study, and reviewing the standards outlined in the City of Madison Personnel Rules, I conclude that the Housing Site Manager classification should be reclassified in CG18/R08. A majority of the changed duties were previously performed by the Housing Maintenance Supervisor (CG18/R08). While the incumbents appear to believe that this additional maintenance work justifies a much higher range (which will be addressed below), it is not appropriate to conclude that work that was admittedly performed by a classification in CG18, R08, and is now assigned among 3 people, should now justify a higher range. The work has historically been classified as CG18, R08 work, and it is appropriate to use as justification for moving the Housing Site Managers to Range 8. In addition, while the Site Managers have additional HUD reporting requirements, which gets into involvement with analyzing budgets, the prior class spec already allowed for reporting to HUD. The additional range increase takes into account the changes in reporting, and the work in interpreting budgets is not more complicated than that performed by Administrative Analyst 2s in the Finance Department, also classified in Range 8. Based on all this, placement in CG18, Range 8 is the most appropriate placement.

While placement in Range 8 appears to be most appropriate in line with the City's classification system, meetings with the incumbents, and materials received from the incumbents, have given me the understanding that it is their strong belief that the duties and responsibilities associated with the Housing Site Manager classification are comparable to City classifications in CG18/R12 and/or possibly CG18/R14. Early in this position study, the incumbents recommended several classifications for review, for comparison purposes. Such classifications include Housing Inspection Supervisor (CG18/R12), Labor Relations Specialist (CG18/R12), IT Technical Services Manager (CG18/R14), Real Estate Development Specialist (CG18/R12), and the recently created Housing Initiative Specialist position (CG18/R10). It should be noted that my findings from this study are not reflective of the quality of work performed by the incumbents, nor is it a reflection of their volume of work. Rather, it is clear that the incumbents are excellent workers who perform high quality work within the Housing Unit and provide valuable assistance to the clients they serve at their respective site locations. However, when conducting a position study, it is our responsibility to evaluate the duties and responsibilities assigned to a position to make a final determination as to how those duties and responsibilities, and the associated levels of discretion, judgment, and other factors, compare to other positions

within the City's classification system. Unfortunately, neither quality of work, or quantity of work (unless it affects the complexity or responsibility level), are factors for consideration during a position study, just as longevity in a position is not a factor. Rather, a study must be focused on the factors mentioned above and described more fully in the City of Madison Personnel Rules.

It is appropriate to address the several classifications suggested by the incumbents, including the recently created Housing Initiative Specialist position, and several other comparable classifications throughout the City.

### Housing Inspection Supervisor (CG18/R12)

The Housing Inspection Supervisor class spec identifies

*"...responsible program direction and supervisory work as the head of the Housing Inspection Section of the Building Inspection Division in the Department of Planning & Community & Economic Development. The work involves managing the enforcement of local and State ordinances and codes pertaining to housing maintenance, exterior property maintenance, weighing and measuring devices, and the Rent Abatement Program. The work is performed under the general supervision of the Building Inspection Division Director."*

The incumbents suggested this position as an appropriate comparable classification by highlighting:

- *"Supervise the activities of staff..."*
- *"Perform supervisory tasks in relationship to subordinates and coordinate activities..."*
- *"Maintain effective team relationships..."*
- *"Establish and maintain policies, procedures, and quality standards, to ensure...efficient operations."*
- *"Resolve complaints from citizens, problems, and crises arising from official orders and citations."*
- *"Approve referrals of matters to the City Attorney's Office for legal action. Refer some issues back to staff for further work-up, data collection/clarification, or other actions before legal steps can be taken."*
- *"Speak before various groups..."*
- *"Coordinate activities which build and maintain effective relationships with the public."*

Both classifications share staff supervision responsibilities, but the Housing Inspection Supervisor provides supervision to a large staff (approximately 15 employees v. approximately 5 employees) performing work in higher salary ranges (up to CG16, R20 v. CG16, R15). While Housing Site Managers direct work assignments and must maintain "knowledge" of maintenance activities, the Housing Inspection Supervisor is expected to maintain "thorough" knowledge of the maintenance activities performed by subordinate staff.

### Labor Relation Specialist (CG18/R12)

The Labor Relations Specialist class spec identifies

*"...highly responsible, professional work in representing the City of Madison's interest in collecting bargaining, contract administration, administering corrective actions and related subjects. Under the programmatic supervision of the Labor Relations Manager, this work is characterized by a high degree of independent judgment and discretion. The incumbent is expected to independently represent the City in resolving grievances, contract negotiations and arbitrations."*

The incumbents suggested this position as an appropriate comparable classification by highlighting:

- *"Conduct grievance meetings for grievances filed by employees."*
- *"Investigate grievance issues, propose and review..."*

- *“...perform other activities necessary to resolve grievances...”*
- *“Provide direction, consultation, and training...”*
- *“...contract interpretation, problem resolution...”*
- *Develop and finalize unit policies and procedures...”*

It is difficult to find similarities between these two classifications. The incumbents indicate that they resolve grievances that are filed by residents and must present evidence in hearings, which is similar to the Labor Relations Specialist’s role in an arbitration. However, the Labor Relations Specialist is responsible for *“representing the City in collective bargaining, contract administration, administering corrective actions and related subjects.”* Actions of the Labor Relations Specialist, especially as it relates to contract negotiations, have a direct impact on the City’s overall operating budget, which is a significant level of decisional impact.

### IT Technical Services Manager (CG18/R14)

The IT Technical Services Manager class spec identifies

*“...responsible supervisory and professional work in directing programs, functions, services and staff of the Technical Services Unit of the Information Technology Department. The Technical Services Unit is responsible for the network, E-mail, telephone systems, and desktop computer systems, software, setup and support. Work involves substantial project leadership; analyzing user needs; assisting users, IT staff, and City officials in meeting technological needs in the area of computer networking and networking and network security; coordinating work in conjunction with City departments, officials, IT staff, vendors, and consultants; and performing research and development of complex and newly-emerging technologies as they may apply to City use. Work is performed under the general direction of the Information Technology Director.”*

The incumbents suggested this position as an appropriate comparable classification by highlighting:

- *“Develop and finalize unit policies and procedures...”*
- *“Hire, train, supervise and evaluate staff and maintain effective employee relations.”*
- *“Resolve issues within project teams.”*
- *“Coordinate schedules and work hours.”*
- *“Maintain effective communications with City officials, officials of other governmental agencies ...vendors, contractors, consultants, City department personnel, etc.”*
- *“Prepare and review specifications, requests for proposals and vendor agreements.”*
- *“Develop, maintain and enforce...policies.”*
- *“Plan, develop, prepare monitor and manage the annual and supplemental budget recommendations...analyze and control expenditures...”*

It is not disputed that both positions share similarities in that they supervise staff and handle issues that arise within their respective areas. However, the Site Managers fail to acknowledge the specialized field of study (Computer Science), level of knowledge, and years of experience required to attain this position. In addition, the IT supervisors all supervise large, professional staffs, through subordinate supervisors, which is not something required of the Site Managers.

### Real Estate Development Specialist (CG18/R12)

The Real Estate Development Specialist class spec identifies

*“...advanced-level professional financial analysis and project management work in the real estate field, including responsibility for the planning, coordination and implementation of the City’s Tax incremental Financing (TIF) Program, redevelopment activities, and the review and analysis of public financing projects and instruments the work is characterized by considerable independent judgment and discretion in the full range of real estate development activities and places*

*emphasis on the more complex and discretionary elements of professional real estate development, including ongoing project management and coordination with and/or leadership of various ad-hoc inter/intra-departmental project teams. Work performed under the general supervision of the Real Estate Supervisor.”*

The incumbents suggested this position as an appropriate comparable classification by highlighting:

- *“...advanced-level professional...”*
- *“...project management work.”*
- *“The work is characterized by considerable independent judgment and discretion...”*
- *“Direct, coordinate and administer...”*
- *“Prepare annual budget recommendations...”*
- *“Prepare reports detailing spending...”*
- *“Working knowledge of governmental agency operations...”*

While Housing Site Managers are expected to direct operations and services at their respective site locations, the Real Estate Development Specialist is expected to provide leadership in *complex and discretionary elements of professional real estate development, including ongoing project management and coordination with and/or leadership of various ad-hoc inter/intra-departmental project teams*. This position provides information to developers seeking to start projects in the City. This information is critical in determining whether projects are approved, and this has an impact on the City’s tax base. There are also significantly higher demands in regards to training and experience requirements. It is difficult to draw relevant comparisons between these two positions as the nature of the work is not comparable.

#### Housing Initiative Specialist (CG18/R10)

The Housing Initiative Specialist class spec identifies

*“...responsible, professional work involving an understanding of local and regional housing trends, the assessment of housing trends in the region and the creation of strategies and initiatives to maintain a broad range of housing choices in the City of Madison, WI. The work involves communicating with organizations that participate in finance, construction and operation of non-profit and private sector housing within the region and researching housing initiatives in other regions; working with other city departments and agencies with planning activities that affect housing in the region. The incumbent will staff the Housing Strategy Committee and will have primary responsibility for the preparation of a biennial housing report for the Mayor and the Common Council. The position will be under the general supervision of the Executive Director of the Community Development Authority.”*

Again, it is difficult to draw relevant comparisons between these two positions as the nature of the work is not comparable. While Housing Site Managers are expected to direct operations and services at their respective site locations, the Housing Initiative Specialist is expected to provide leadership in assessing regional housing trends and also the creation of city-wide strategies and initiatives. There are also significantly higher demands in regards to training and experience requirements.

After closely evaluating the duties and responsibilities associated with the Housing Site Manager position, I concluded that classifications in CG18/R08 were more appropriate for comparison purposes, specifically, the Administrative Analyst 2 and the Housing Operations Analyst. Each will be discussed in turn.

### Administrative Analyst 2 (CG18/R08)

The Administrative Analyst 2 class spec identifies

*"...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."*

The incumbents have experienced an increase in reporting requirements and more involvement in Housing's budget process. However, the primary function of the Administrative Analyst 2 requires incumbents to, *"Conduct or participate in varied and complex management audits, program evaluations and special studies regarding departmental operations, budgets, budget requests, and general City finances and revenues. Prepare and recommend operating and capital budgets; and provide expertise and advice on a wide variety of related management activities and initiatives."* The work of the Housing Site Managers does not exceed that of the Administrative Analyst 2, who is responsible for developing and recommending operating and capital budgets for City departments/divisions as a whole to the Mayor's Office for approval.

### Housing Operation Analyst (CG18/R08)

The Housing Operations Analyst class spec identifies

*"...This is responsible professional work in analyzing, developing and maintaining Housing Operations Unit systems and procedures; developing funding proposals and administering grants; directing grant-funded projects and staff; and performing and/or participating in various staff assignments relative to monitoring and/or improving unit operations. This work, under the general supervision of the Housing Operations Unit Director, is characterized by considerable judgment and discretion."*

The incumbents cite the demand to continuously adapt to changing regulations and reporting requirements. The primary function of the Housing Operations Analyst requires incumbents to *"Review and interpret applicable Federal, State and Local regulations and determine impact on Housing Operations Unit. Conduct analysis to identify issues and consult with staff in order to develop responsive action plans. Draft comments to HUD on proposed rules. Revise or update policies, documents, forms, handbooks and procedures consistent with applicable standards. Identify and report areas of non-compliance in order to initiate corrective action. Provide related guidance, professional consultation and technical assistance to Unit Director, Housing Managers and other staff on policies, procedures and related issues."* This is more comparable to the work of the Site Managers. While the Housing Operations Analyst is not supervising staff, the Site Managers are not drafting comments to HUD which could have a direct impact on how the Housing Unit is run.

### Objective-level Professional Positions in CG18-08

It should also be noted that CG18, Range 8 is the objective level for most of the City's professional classifications. Classifications such as Planner 2, Accountant 2, HR Analyst 2, Architect 2, Engineer 2, and others are found at this level. It is intended that once a person reaches the objective level of their classification, they should be able to perform the broad

range of duties and responsibilities associated with that classification. Higher levels such as the 3 and 4 are reserved for more complex projects and/or team lead/supervisory responsibilities. The Site Managers are also expected to perform a broad range of professional-level work, including overseeing budgets, handling tenant concerns, overseeing the grievance procedure for tenant complaints, etc. The work they perform in these areas is similar to the duties performed by professionals within their specific field of study.

Language found in all city class specs allow for general comparisons among classifications. However, it is important when reviewing classifications to not consider language when taken outside of its proper context. Rather, classifications need to be reviewed and compared in their entirety, with an analysis being conducted as to the overall level of responsibility, decisional impact, and other factors as identified in the City of Madison Personnel Rules. Again, based on my review, I find that duties of the Housing Site Manager classification are most comparable to classifications found in CG18/R08 (Housing Operations Analyst, Housing Maintenance Supervisor, and Administrative Analyst 2,). As such, I recommend recreating the Housing Site Manager classification in CG18/R08, and reallocating the incumbents to the new range.

Again, it should be noted that classification decisions are based on the numerous factors outlined in the Personnel Rules. The incumbents work at a high level and provide a valuable service to the City in implementing and applying HUD regulations to preserve City funding opportunities. However, the work of the Housing Site Manager is most comparable to other similar classifications in CG18/R08. While the result of this position study only produced an increase in one (1) range, it should be noted that the charge of a position study does not allow for recognition or appreciation of high performance or volume of work, and clearly the current incumbents perform their assigned duties at a high level. While the incumbents sought an increase of 5 -7 ranges, the one-range increase shouldn't suggest a negative view of the value of their work performed.

We have prepared the necessary Resolutions to implement this recommendation.

Attachments

Compensation Group/Range	2012 Annual Minimum (Step 1)	2012 Annual Maximum (Step 5)	2012 Annual Maximum + 12% longevity
18/07	\$51,591	\$61,114	\$68,458
18/08	\$53,878	\$63,935	\$71,604

- cc: Natalie Erdman-CDA Executive Director
- Agustin Olvera – Housing Operations Program Manager
- June Garvin – Housing Site Manager
- Sally Hanks – Housing Site Manager
- Elizabeth Yszenga – Housing Manager
- Mike Lipski – HR Services Manager