

TO: Personnel Board

FROM: Julie Trimbell, Human Resources

DATE: April 12, 2023

SUBJECT: Planner – Planning Division

The Human Resources Department received a request from Planning Division Director Heather Stouder and Principal Planner Bill Fruhling on February 15, 2023 to study the 1.0 FTE position #4573 of Planner 2 (CG 18, Range 8), currently filled by Angela Puerta, 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, submitted analysis, the current class specification progression series, and conducting interviews with Bill and Angela, I recommend recreating the position as a Planner 3 in CG18, Range 10 and reallocating the employee to the new position.

Angela was originally hired into the Planning Division as an AASPIRE Intern in 2014 and promoted to a Planner 2 position in 2016. 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 and following the retirement of a Planner 4, this position took on additional responsibilities to include project management and leadership roles within the Planning Division. Angela has served as project manager, co-project manager or lead with several major projects, including the Town of Madison Attachment, Northeast Area Plan, South Madison Neighborhood Plan, Neighborhood Initiatives, and the Greater Madison Music City initiative. These large scale projects involve: scoping; developing strategies, planning and scheduling; providing direction and review to other team members; working and meeting with the Mayor, Alders, boards, committees, other agencies and external partners; policy and plan formulation; conducting presentations, public meetings and stakeholder outreach; identifying issues and providing recommendations; data collection and complex analysis; grant administration; preparing resolutions and recommending changes; reporting; and serving as primary staff support to review bodies. This position is also responsible for mentoring new employees, supervising interns, and will provide direction to the new Community Navigators, who will conduct outreach to current residents, property owners, business owners, and other stakeholders for the planning process.

The level of work currently being performed in this position 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 Planning, it is appropriate that it be placed at the level of

Planner 3. As a result, I recommend recreating position #4573 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: 2/19/2023

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 Fruhling – Principal Planner Manager