

TO: Personnel Board

FROM: Tameaka Bryant, Human Resources

DATE: June 24, 2020

RE: Program Assistant 1-Finance

City of Madison Finance Director Dave Schmiedicke and Risk Manager Eric Veum have requested a study of the Program Assistant 1 (Pos. #4579, CG20, R11), currently occupied by Mary Lloyd. Ms. Lloyd has been with the City of Madison since 2008. She has held a variety of positions in the Finance Department, and is currently a Program Assistant in the Risk Management unit of Finance. Her responsibilities have grown to include elements of the Administrative Assistant work duties and responsibilities as outlined in this memo. Based on the attached position description that was submitted and interviews with Mr. Veum and the incumbent, I recommend recreating position #4579 of Program Assistant 1 as an Administrative Assistant and reallocating the incumbent to an Administrative Assistant in CG20, R14.

The Program Assistant 1 class specification (attached) identifies

...programmatic support work in a City department, division or other independent program unit. Employees in this class support a particular program or programs by performing or coordinating specialized program functions, interpreting and applying programmatic policies and procedures, and performing administrative tasks in support of the program. The work requires exercising considerable judgment and discretion in the interpretation and application of policies.

The Administrative Assistant class specification (attached) identifies

...responsible paraprofessional staff support work relative to the development and implementation of divisional and/or departmental administrative programs and functions. Work is characterized by responsibility for a wide variety of administrative services (such as the development and implementation of budgetary documentation and fiscal controls, personnel, purchasing, payroll, and the supervision of office clerical activities); and/or direct responsibility for a comprehensive administrative program requiring the development and integration of diverse and complex operational data inherent to unit operations.

Ms. Lloyd is responsible for various initiatives within the Risk Management unit. She is responsible for the Certificate of Insurance database; property and liability claim investigations; investigation and settlement of subrogation claims; direct payment claims; Risk Management Budget; coordinating the CARS (Centralized Automobile Regulating System) Committee; and tracking police reports. When Ms. Lloyd first began in the Risk Management unit, her work was more focused on front desk coverage and her work was closely reviewed by Mr. Veum. As time went on, she has taken on greater responsibility and has taken on job duties that previously were done by the Risk Manager in order to give him capacity to attend various meetings and complete higher level strategic tasks.

Ms. Lloyd has taken over the certificate of insurance database. This database is a partnership with Community Development's mortgage program. When the City grants a mortgage to a resident, an

insurance certificate needs to be filed to ensure the mortgage is covered. Risk Management must also verify that a proper insurance certificate is in place for City contracts and this database is accessed daily for this purpose by Risk Management and other City departments. She is the liaison to IT for the insurance certificate database, has worked to make this program more efficient by utilizing SharePoint, and independently researches who is in compliance with the program. She also is responsible for subrogation claims, which arise when someone damages City property or vehicles. Before when a claim came in, Mr. Veum would investigate and approve them, but now Ms. Lloyd is doing the investigation, negotiation and settlement.

Ms. Lloyd is also the point person for direct payment claims. These are claims for things such as damaged mailboxes. Previously Mr. Veum processed and approved these claims but now Ms. Lloyd does that work. She is also is the point person for Risk Management’s budget—she is responsible for the money going where it needs to, and assists in making decisions on where funds should go. She also is responsible for keeping track of where the unit is at in spending and what money is left to spend.

It is apparent that this position has taken on increased responsibility within the City’s Risk Management program. While a Program Assistant provides support for a particular program through applying policies and procedures, the work of the Administrative Assistant is distinguished by “...direct responsibility for a comprehensive administrative program requiring the development and integration of diverse and complex operational data inherent to unit operations.” The City’s Risk Management program is one of the most complex in the City, and Ms. Lloyd has taken on direct responsibility for significant aspects of this program, as outlined above. This has allowed the Risk Manager to focus his attention on higher-level responsibilities. The work described in this memo goes beyond that expected at the Program Assistant 1 level and more closely aligns with the Administrative Assistant classification. Given Ms. Lloyd’s increased responsibility and taking on additional duties, as well as direct responsibility for insurance certificate program implementation and improvement, it is my recommendation to place Ms. Lloyd into the Administrative Assistant classification.

We have prepared the necessary Resolution to implement this recommendation.

Editor’s Note:

Compensation Group/Range	2020 Annual Minimum (Step 1)	2020 Annual Maximum (Step 5)	2020 Maximum +12% longevity
20/11	\$ 50,018.02	\$ 55,987.62	\$ 62,706.02
20/14	\$ 54,498.08	\$ 60,448.96	\$ 67,702.96

cc: Eric Veum— Risk Manager
 Dave Schmiedicke —Finance Director
 Greg Leifer—Employee and Labor Relations Manager
 Mike Lipski-Human Resources Services Manager