

TO: Aaron Olver

FROM: Harper Donahue, Human Resources

DATE: January 22, 2014

SUBJECT: Ms. Andrea Freedman/Program Assistant 1 (Economic Development Division)

At the request of the Economic Division Director, Mr. Aaron Olver, I have studied the position (#696) of Program Assistant 1 (CG17, Range 11) currently occupied by Ms. Andrea Freedman. I have met with Mr. Olver and Ms. Freedman (the incumbent), and based on these meetings, a review of the position description (attached), and the City of Madison Personnel Rules, I recommend that Ms. Freedman be reclassified to a Program Assistant 2 (CG17/R12) for the reasons discussed in this memo.

The Program Assistant 1 class spec (attached) identifies

".. . responsible administrative support and advanced-level secretarial and/or programmatic work in a City department, division or other independent program unit. Employees in this class perform a wide variety of administrative, secretarial, and program support functions including such functions as office management; secretarial services to program head and professional staff; programmatic recordkeeping and reporting; performance and/or coordination of specialized program functions; and/or direct involvement in budget development and monitoring. The work requires exercising considerable judgment and discretion in the interpretation and application of policies and the development of operating systems and procedures. Employees in this class work under the general supervision of the department, division, or program head and may provide direction to limited numbers of permanent and/or non-permanent staff."

Specific responsibility may include

- "Operate as unit Office Manager. Perform and/or coordinate all administrative and clerical activities including purchasing, payroll, recordkeeping, liaison with Document Services and Information Technology, information dissemination, personnel processing and recordkeeping, printing and related functions. Act as unit records manager, coordinate publications, and desktop publishing, and coordinate the processing of materials to the Common Council. Ensure that office systems are operating in an effective, efficient and correct manner. Identify and implement needed improvements. Prepare operating procedures manuals for training and for ongoing use by staff. Develop, implement and monitor office procedures and systems.
- Act as liaison with Document Services and Information Technology in regard to the development, improvement, and/or implementation of new computer systems and/or equipment. Ensure that staff receive the training and ongoing support necessary to effectively use the system. Provide support and problem-solving services to staff relative to software, networking and other computer applications.
- Gather, organize, and report administrative data, operational information and/or statistical data. Assist professionals/paraprofessionals in the preparation of comprehensive reports and prepare reports and related materials independently.
- Collect and organize both operating and capital budget data. Review budget data for consistency with format and past precedents. Make budget projections as directed. Prepare computerized budget document for submission. Ensure mathematical accuracy of all calculations on budget document and correctness of narrative. Prepare additional materials and documentation as necessary.

- Maintain budgetary, cost accounting and related records according to established accounting or program procedures. Establish accounts; post entries and balance; prepare periodic accounting, budgetary, or related reports as necessary; and audit purchase orders, vouchers, expense forms, payroll data, etc. Prepare billings and year-end account close-out reports.
- Manage and monitor activities for a major board or commission or several related groups including the preparation of minutes and agenda in the City's Legistar system, scheduling of meetings, acting as a liaison between program staff and appointees, coordinating the dissemination and processing of information and maintaining records. Perform a variety of specialized program activities and coordinate the performance of others that are both ongoing and of a special project nature."

On the other hand, a Program Assistant 2 (attached) describes similar duties and responsibilities but also requires incumbents to carry out, "a number of additional program functions which require specialized program knowledge, independent decision-making; and responsibility for specific operating procedures and systems development and communication. Employees in this class work under the general supervision of the department, division, or program head."

Ms. Freedman has been with the City's Economic Development Division since July 2006. In 2006, Freedman came to the City's workforce as a Clerk Typist. In March of 2008, Ms. Freedman was promoted to a Program Assistant 1. Since being promoted to a Program Assistant 1 in 2008, the incumbent's responsibilities have increased to include the coordination and administration of several of EDD's Office of Real Estate Services programs, including leases, licenses, permits, easements, encroachments and contracts. Ms. Freedman is also responsible for managing the development of EDD's budget, which includes collecting, entering and submitting DPCED's Capital budget. Ms. Freedman also assumes administrative, budget, accounting and payroll functions for CDA.

The work Ms. Freedman performs with the Economic Development Division clearly falls within the Program Assistant 2 description. According to Ms. Freedman's position description (attached), 60% of her time involves coordination and management responsibilities associated with Real Estate Program activities. An additional 20%, of her time is spent performing accounting, purchasing and budget related duties, and 15% of her time is spent performing "office management" related duties. As such, Ms. Freedman's position should be recreated as a Program Assistant 2 (CG17, R11), and she should be reallocated to the new position.

We have prepared the necessary Resolution to implement this recommendation.

Attachments

Compensation Group/Range	2014 Annual Minimum (Step 1)	2014 Annual Maximum (Step 5)	2014 Annual Maximum +12% longevity
17/11	\$41,811	\$47,224	\$52,884
17/12	\$42,929	\$48,584	\$54,418

cc: Aaron Olver – EDD Director
Mike Lipski-HR Services Manager