TO: Personnel Board

FROM: Emaan Abdel-Halim, Human Resources Services Manager

DATE: 12 March 2023

SUBJECT: IT Finance and Project Portfolio Manager, Information Technology Division

On January 24, 2023, the City of Madison Information Technology (IT) Director Sarah Edgerton, submitted a request to Human Resources for a position study of the IT Administrative Services Manager position #819 in CG18, Range 10; currently occupied by Amanda Lythjohan. This study request is recreating the position with higher level responsibilities for more complex administrative and financial management activities in relation to all City IT enterprise-wide technology procurement, contracting and coordination with all city agencies. Amanda also manages the Project Portfolio Management Team, which comprises of Project Managers who manage complex, enterprise-wide technology projects. After a review of the updated position description, meeting with the supervisor and employee, and upon a full analysis, I recommend the following for the reasons outlined in this memo:

- Delete classification of IT Administrative Services Manager in CG18, Range 10 of the salary schedule;
- Recreate the classification IT Administrative Services Manager in CG18, Range 16
- Recreate position #819 the new classification of IT Administrative Service Manager in the permanent salary detail of the 2023 IT Division operating budget; and
- Reallocate the employee, A. Lythjohan, to the new position with the working title of IT Finance and Project Portfolio Manager.

Over several years, many City agencies have increased used of various technology solutions and equipment for more efficient operations. In order to maintain security of operations, IT has transitioned towards more enterprise-wide technology procurement, and in turn more system-wide, centralized IT portfolio project management.

First, a review from the classification specification for the IT Administrative Services Manager describes the work as:

> ... responsible **professional, managerial, administrative, and supervisory work within the Information Technology (IT) Department**. This position provides professional staff support in the **development, analysis and administration of the department's budget**; in the development and/or analysis of departmental **programs, operations, and functions**; and in overseeing and developing **the full range of centralized administrative support functions** (e.g. payroll, purchasing and contracts, and administrative support activities). Under the general supervision of the Information Technology Director, the employee functions as an **integral member of the IT Leadership Team** by providing expertise in the areas of staff analysis, management, and administration. Work is characterized by the **regular use of independent judgment and discretion** [emphasis added]

Upon creation the position of IT Administrative Services Manager focused primarily on budget responsibilities, program coordination, and supervision of the administrative functions of the IT Department. However, as City agencies procure and implement software solutions and technology services, there is an ongoing internal need for support of these new services.   Such support have been

assigned as added responsibilities to existing staff in positions which align with the needed work. Given the IT Administrative Services Manager position manages the agencies financial and administrative systems, which includes oversight of purchasing, contracting and grant funding; it was logical to add IT project portfolio management and responsibility for IT Board of Public Works Contracts, IT Vendor Contracts to the position.

For example, when multiple agencies use the same software or technology solutions for their operational needs, but purchase these same products separately; it costs the City more money. By coordinating procurement of technology solutions enterprise-wide, IT can more effectively implement and manage the ongoing support needs while reducing overall costs to the City. Amanda has taken on these duties to strategically negotiate Master Service Agreements (MSAs) to obtain better contract terms by working closely with the Office of the City Attorney, agencies and vendors to reduce prices and ongoing maintenance costs by securing. MSAs serve as an overarching agreements for all contract terms of current and future purchases from a single vendor. By streamlining the purchasing process, IT can create uniformity with vendor contract terms and make it easier, faster and more efficient to make additional related purchases from a vendor. Such enterprise wide technology solutions are key to maintaining the security of the City's technology infrastructure for 30 City agencies to function efficiently and effectively.

Now a review from the position description for the proposed IT Finance and Project Portfolio Manager:

> … This is a **highly responsible professional, managerial, administrative, financial and supervisory work within the IT Department**. Under the general supervision of the IT Director and working closely with the Assistant IT Director and Team Leads, this position **facilitates the effective and efficient management of the department**; **develops and implements systems** that enable the IT Director, Assistant Director and Teams Leads **to make better program and operational decisions**; and **provides analytics that inform decision making and resource allocation**. Work is performed under **broad management policy** and requires **considerable independent judgement and discretion** in supervising, directing and controlling the administrative and financial activities in assigned areas of responsibility. Under the general supervision of the IT Director, the employee functions as an **integral member of the management team** by **providing expertise in the areas of budget, program and staff analysis, systems improvement, and data management**. This position **provides consultation at all levels of the organization** and exercises a high level of independent judgement and discretion in developing program goals and objectives. [emphasis added]

Amanda successfully implemented the first MSA for IT in 2018 and has since refined the process with the latest one completed in 2022. The complexity of these have changed over time. Previously, most purchases were easy on-premise solution one-off contracts and City IT was responsible for pretty much everything. Now with techologies moving towards more cloud based or vendor hosted services, this transition has made a huge impact in how IT contracts and supports these ongoing services. Often, some vendors may not fully understand their software service solutions and what appropriate terms should be included. Subsequently, Amanda works closely with Assistant City Attorney Lara Mainnela to research, gather and understand the necessary terms for such contracts.   Contracts for any software/technology purchases over $25K are required to go through in-depth and rigorous analysis to be in compliance with the City's purchasing policy. Additionally, purchases under $25K are reviewed through a expedieted process with APM 3-20 review.

The addition of citywide enterprise wide purchasing contracts assures that the integrity of information systems and business controls to support information technology systems and services are not compromised. Given the scope and impact of to overall City operations, the proprosed classification does serve in a comparable role as the IT Technicial Services Manager in CG 1, Range 16. Where the IT Adminstrative Services Manager is managing the enitre contracting proces for all technology/eequipment purchases in the City; and the IT Technical Services Manager is managing the network staff and implementating the ongoing support of purchased technologies. Amanda works with all City agencies (and Dane County Public Health) to coordinate with the IT Team leads in order to manage the various IT project portfolios. This is critical and a key role to ensure IT purchases are in compliance with City policy and our service needs are clearly contracted with vendors.

Therefore, I recommend the classification of IT Administrative Services Manager be deleted from CG18, Range 10 and recreated as a new classification in CG18, Range 16. Additionally, I recommend that position # 819 be recreated in the new classification in the IT Division operating budget, and reallocate the employee, A. Lythjohan, to the new position.

The necessary resolution to implement this recommendation has been drafted.

Editor's Note:

Compensation Group/Range	2023 Annual Minimum (Step 1)	2023 Annual Maximum (Step 5)	2023 Annual Maximum (+12% longevity)
18/10	$ 74,162.66	$ 89,130.08	$ 99,825.70
18/16	$ 97,877.52	$ 117,953.16	$ 132,107.56

cc: Sarah Edgerton – IT Director
        Erin Hillson - HR Director
        Tory Larson - Interim Employee and Labor Relations Manager
        Amanda Lythjohan - Employee