

TO: Personnel Board

FROM: Sarah Olson, Human Resources

DATE: September 28, 2016

SUBJECT: Transit Office Manager Position Study

Transit General Manager Chuck Kamp requested that I study the position of 1.0 FTE Transit Office Manager (position #2785; class S002) in CG43, Range 12, currently occupied by Ann Schroeder. Mr. Kamp requested that the position be studied to reflect additional duties that were added following the retirement of the Transit Service Manager (CG44, R16) in January, 2016, including supervision and program management. Changes in staffing allowed for a reorganization of job duties and the opportunity for the Office Manager to take on additional responsibilities. In response to this request, and after speaking with Mr. Kamp and the incumbent, Ann Schroeder, I have completed my study of the Transit Office Manager position. As a result, I recommend Ms. Schroeder's current position of Transit Office Manager in CG 43, Range 12 be recreated as a Transit Office Manager in CG 43, Range 14, and the incumbent reallocated to the new position. Range 14 in CG 43 does not currently exist therefore we will need to create Range 13 and Range 14 in the salary schedule for CG 43.

The Transit Office Manager class specification describes the work as

...responsible administrative support and advanced-level secretarial and/or programmatic work in the Madison Metro Bus Utility. This position performs a wide variety of administrative, secretarial, and program support functions including office management, administrative support to the department head and professional staff; programmatic record keeping and reporting; and performance and/or coordination of specialized program functions. The work involves exercising considerable judgment and discretion relative to the interpretation and application of administrative policies and procedures, and in the development of operating systems and procedures. This position works under the general supervision of the Transit General Manager.

In early 2016, Transit Service Manager Ann Gullickson retired and a reorganization of job responsibilities occurred. Prior to her retirement, the Transit Employee Relations Assistant (CG43, R11) reported to Ms. Gullickson. The Transit Office Manager provides direct administrative support to the Transit General Manager, and the Transit Employee Relations Assistant provided administrative support for employees, especially as it relates to Human Resources activities such as employment, benefits, FMLA, Worker's Compensation, and training activities. However, the Transit Office Manager was often the back-up for the Employee Relations Assistant on FMLA questions, and both positions worked on recruitments and in the City's Applicant Tracking software, NEOGOV. Because of this overlap, when Ms. Gullickson retired, Ms. Schroeder took on supervision of the Employee Relations Assistant.

In addition to re-assigning supervision of their Employee Relations Assistant, Metro Transit looked to shift program oversight and management of the drug and alcohol program, which was also Ms. Gullickson's responsibility. The Transit Office Manager was already assisting Ms. Gullickson with much of the program and providing informal leadership. Ms. Schroeder now administers the FTA drug and alcohol testing program and is designated as Metro's Drug and Alcohol Program Manager. She develops and presents required safety sensitive employee

training and FTA reasonable suspicion training to supervisors, employees and contractors. She also must monitor and provide technical assistance to contractors and subrecipients regarding their drug testing programs. When Metro receives positive drug results, she meets with the employee to explain the next steps including their leave time and referral to a substance abuse professional.

This position also serves as Metro's Public Records Manager, which involves responding to open records requests and consulting with the City Attorney's Office as necessary, and then communication with employees, other agencies and external contacts regarding their open records requests.

Finally, this position serves as Metro's Racial Equity and Social Justice Initiative (RESJI) liaison, leads Metro's Equitable Workforce Planning team, and serves as Metro's Civil Rights Coordinator. As Metro's Civil Rights Coordinator, she has been participating in APM 3-5 investigations. Ms. Schroeder is instrumental in bringing racial equity awareness to the forefront including recommending when Metro should be viewing situations from an equity lens, (ex: decision making in detours and service areas). She coordinates Title VI information and reports annual statistics to the FTA including information coordination for audits and assists the EEO Office with Equal Employment Opportunity functions. She looks for opportunities to use the Equitable Hiring Tool and has helped Transit Managers through its use. Although she raises these issues and concerns, she is normally not the final decision-maker on such issues.

Mr. Kamp requested that Human Resources evaluate the Transit Office Manager and consider reclassification to CG 44, Range 9, which would put this position in the professional/supervisory/managerial compensation group. When conducting a position study, it is our responsibility to evaluate the duties and responsibilities assigned to a position and determine 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. In conversation with Mr. Kamp, he compared the highly confidential nature of Ms. Schroeder's position to what similar positions in Police and Fire handle on a regular basis. Both Fire and Police have an Assistant to the Chief in the classification of Administrative Assistant-Confidential in CG 17, Range 14, and both work in highly confidential roles. It should be noted that compensation group 17 is equivalent to compensation group 43. The class specification for Administrative Assistant – Confidential describes work as

...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. This work is performed with a high degree of independence and discretion. Under the general supervision of a department or division head, work is normally assigned in terms of program objectives and directives; and employees are responsible for establishing the necessary administrative procedures, methods and controls. Employees may supervise subordinate administrative and clerical staff.

It is apparent from looking at this class specification that an Administrative Assistant may or may not supervise staff, but the Administrative Assistant may have direct responsibility for a complex program within an agency or for the City. In addition to the Administrative Assistants

in Police and Fire that Mr. Kamp identified as comparable positions, I reviewed other Administrative Assistant classifications in the City. For example, Lisa Veldran is the Administrative Assistant to the Common Council and as such, supports 20 Alders with various requests as one of two staff providing administrative support in the office. Ms. Veldran frequently researches issues on behalf of the Alders and handles other requests, while also supervising a lower level administrative position. David Pilsner, Human Resources Administrative Assistant, oversees the City's position control, which has a direct impact on the City's budget and the ability to hire and/or reclassify positions. Mr. Pilsner works frequently with Finance and agency staff to ensure that the proper authority exists when agencies seek to fill positions. Reporting to the HR Director, Mr. Pilsner also develops and manages the HR budget in conjunction with the Director. Finally, the Administrative Assistant in Information Technology is responsible for a complex administrative program serving as Records Coordinator for the City. This involves contracting with the State of Wisconsin, responsibility for notifying affected departments of any issues with records, developing policies related to electronic record keeping and making sure retention schedules are met. Reporting to the IT Director, this position is also involved with developing and monitoring the IT budget, in conjunction with the Director.

When comparing these positions to Ms. Schroeder's position at Metro, a similar level of responsibility and authority is seen. Ms. Schroeder reports directly to the Transit General Manager. As described above, Ms. Schroeder serves as Metro's Drug and Alcohol Program Manager. This is a complex program within Metro at a similar level to the Position Control and Records Management programs described above managed by other Administrative Assistants in the City. Mr. Kamp and Ms. Schroeder both explained the special management projects and problem-solving that is required in this role. Examples of these include being a lead on the remodel project, finding "lost" Mechanic positions, identifying inadequate training due to contracting issues, and identifying problematic processes in overall Metro or unit procedures and developing alternate approaches. However, the above class spec indicates that an Administrative Assistant is expected to support work relative to the development and implementation of divisional and/or departmental administrative programs and functions and therefore have the ability to craft solutions to areas that need improvement. Finally, when asked if one were to recruit for this position, what qualifications might be needed, Mr. Kamp felt that Secretary to the Mayor (CG 19, Range 8) would possess the qualifications needed to perform this work. When this position was last posted in 2008, the requirements were as follows:

Four years of directly-related experience as an executive assistant for a high level governmental official, business leader or non-profit director, including secretarial and administrative responsibilities. Such experience would normally be gained after graduation from high school supplemented by secretarial or business courses.

This compares favorably to the training and experience requirements of the Administrative Assistant classification, which are

Four years of varied administrative and/or office management experience (e.g., budgeting, personnel, purchasing). Such experience would normally be supplemented by college level coursework in public administration, business administration, or a related field. Possession of a four year degree from an accredited college or university may be substituted for three years of experience.

This is also similar to the training and experience requirements in the current class specification for the Transit Office Manager.

The complex programmatic authority for the Drug and Alcohol Program, role in the RESJI, and the added supervision of the Employee Relations Assistant that have been added require greater technical knowledge and the position reports to the Department Head makes it appropriate for the position to be reclassified in the same compensation group as an Administrative Assistant. It should be noted that, except for the Litigation Assistant in the City Attorney's Office, the Administrative Assistant is the highest compensated administrative position in the City's compensation plan.

As noted at the beginning of this memo, CG43 does not currently have salary ranges above Range 12. As a result, I recommend creating Range 13 and 14 as listed below. The salaries are comparable to the similar ranges in CG20.

The necessary resolution to implement this recommendation have been drafted.

cc: Chuck Kamp-Transit General Manager
Mike Lipski-HR Services Manager

RANGE 13	Step 1	Step 2	Step 3	Step 4	Step 5	Max + 12% longevity
Biweekly	\$1,838.08	\$1,889.66	\$1,941.32	\$1,992.83	\$2,049.50	\$2,295.44
Annual	\$47,790.08	\$49,131.16	\$50,474.32	\$51,813.58	\$53,287.00	\$59,681.44

RANGE 14	Step 1	Step 2	Step 3	Step 4	Step 5	Max + 12% longevity
Biweekly	\$1,889.66	\$1,941.32	\$1,992.83	\$2,049.50	\$2,096.01	\$2,347.53
Annual	\$49,131.16	\$50,474.32	\$51,813.58	\$53,287.00	\$54,496.26	\$61,035.81

TRANSIT OFFICE MANAGER

Compensation Group/Range	2016 Annual Minimum (Step 1)	2016 Annual Maximum (Step 5)	2016 Annual Maximum +12% longevity
43/12	\$45,223	\$51,368	\$57,532
43/13	\$47,790	\$53,287	\$59,681
43/14	\$49,131	\$54,496	\$61,035