TO: Personnel Board

FROM: Brooke Gillitzer, Human Resources

DATE: 27 February 2023

SUBJECT: Transit Accountant 3

At the request of Metro Transit Finance Manager Jennifer Schiller, received on 8/5/2022, I conducted a position study for the position #3873 of Transit Accountant 3 in CG44, Range 10. This reclassification requests comes from taking on additional duties due to a retirement in 2013 and dramatic increases in grant funding for Metro Transit. After meeting with Transit Finance Manager Jennifer Schiller (the position's supervisor) and the employee, Scott Korth; and upon review of the updated position description, I recommend the following for the reasons outlined in this memo:

- Delete position #3873 as a Transit Accountant 3 in CG44, R10;
- Create a new classification series of Transit Grants Administrator 1-4 in CG44, R 6, 8,10, 12, respectively;
- Recreate position #3873 as a Transit Grants Administrator 4 in CG44, R12 in the Metro Transit operating budget; and
- Reallocate the employee, S. Korth into the new position.

S. Korth was hired as a Transit Finance Supervisor in 2006. In 2010, S. Korth transferred into a Transit Accountant 2 position. In 2017, S. Korth was moved into the Transit Accountant 3 position. Due to a retirement in 2013, S. Korth has been responsible for all of the grants administration for Metro Transit and also handles procurement for Planning and DOT grants. S. Korth is currently managing and administering approximately $200 million in grants. Over time, the responsibilities of the position have evolved and include seeking out and researching grant opportunities, developing projects and proposals by coordinating with other City agencies and community partners, overseeing financial aspects, monitoring compliance and fulfilling reporting obligations.

First, a review of the classification specification for the Transit Accountant 3 describes the work as:

> … This is the **advanced project level** of the professional Transit Accountant series. Under the general supervision of the Transit Accountant 4, employees at this level **supervise specific Metro Transit accounting functions of limited scope** and perform a **variety of high level professional accounting projects or assignments**. The position has **varying degrees of responsibility** for general accounting, budgeting, FTA grants, audits, procurement, and financial reporting which are **performed independently** under the general supervision of the Transit Accountant 4 or Transit Finance Manager. Employees may lead lower-level staff in the completion of projects but are not formal supervisors … [emphasis added]

Since 2013, S. Korth has been solely responsible for the grant management activities at Metro Transit. In January 2022, S. Korth began teaching an Accountant 1 about procurements. S. Korth ensures that the Accountant 1 has information needed for fiscal notes and ensures grant strings are set up. S. Korth also works with the Accounts Payable/Receivable Clerk by giving by providing the project strings for a grant or a federal projects.

The increase in grants available results in more oversight, management and administration from S. Korth. Depending on the project needs, regulations and policies, his role may look different for different projects. S Korth may need to step in as a project manager for some projects. He is also responsible for knowing the different reporting requirements to different entities such as Federal funding versus State funding requirements. S. Korth manages approximately 200 million dollars in grants; with roughly 48 million dollars in stimulus funding awarded to Metro Transit.

S. Korth meets regularly with Metro Transit Finance Management such as Justin Stuehrenberg, Transit General Manager; Jennifer Schiller, and Rachel Johnson, Chief Administrative Officer; to discuss grant opportunities. Grant opportunities may be presented to S. Korth by other Metro manager and he also makes suggestions to managers about potential grant opportunities.

S. Korth works closely with staff of the Metropolitan Planning Organization (MPO). Work includes planning and coordinating the Transportation Improvement Plan (TIP) with MPO. TIP is a coordinated listing of short-range transportation improvement projects anticipated to be undertaken in the next five-year period. Metro Transit is doing all of the grants for Bus Rapid Transit (BRT) instead of the City's Department of Transportation (DOT) due to staffing limitations. A BRT system is a high-quality bus-based transit system that delivers fast, comfortable, and cost-effective service with a high-level of capacity. S. Korth also works closely with the DOT due to the work not being in the scope of Metro Transit employees. S. Korth also works with Streets and Engineering for projects such as on the Metro Transit Hanson Road Satellite Bus Facility Remodel and the Metro Transit Maintenance Facility phased upgrades located at 1 S. Ingersoll St (formally 1101 E. Washington Ave.) due there being a 6 million dollar grant and federal funding. S. Korth ensures the project strings are accurate.

Examples of community partnership that S. Korth identifies and works with include MG&E, UW-Madison, WIDOT and New Flyer. One key partnership is with MG&E where Metro Transit gained three electric buses, MG&E offered their expertise in the electric field, paid for the upgrading of the facilities, and matched the infrastructure cost component. S. Korth was responsible for coordinating with the partners and tracking expenses to ensure correct allocations.

S. Korth manages the Transit Asset Management (TAM) project with managers signing off on the work. TAM is a model that prioritizes funding based on the condition and maintenance of transit assets, such as vehicles, equipment and/or facilities. S. Korth sets ups the meetings, sends out all of the needed materials, and it the point person for tri-annual reviews. S. Korth acts as a program manager for Section 5310 funding and administers the grants that MPO awards. This includes helping with procurements, making sure the recipient is fulfilling their end, and doing annual site visits.

Now, a review of the class specification for Grants Administrator 4:

> … This is the **senior level** of the Grants Administrator series. This level is characterized by ongoing **professional leadership responsibility** both with respect to subordinate staff and **ongoing programmatic expertise**. Work involves responsibility for both **high-level multi-disciplinary** community development projects, as well as **substantive responsibility** for the **general management and program development** of the office as a member of the management team. Work is performed under general supervision. [emphasis added]

S. Korth works at a senior level as the only person administering grants at Metro Transit and providing expertise for other departments as well. He provides leadership to Metro Transit with his knowledge of grants and works with management to recommend funding. S. Korth has the substantive responsibility of managing and administering approximately $200 million of funding that include multi-million dollar projects. He is responsible for preparing and submitting grant applications, submitting resolutions to the Common Council, process accounting entries related to grants, project management of funded programs if needed, making sure all parties are in compliance, adjusting budgets, submitting reports and making sure the reports comply with regulations, ensure there is documentation so funding is not jeopardized, auditing, and creating partnerships with other City agencies and with community businesses.

Based on a review of the aforementioned classification, the work S. Korth performs aligns most closely with the responsibilities of the Grants Administrator 4 classification. However, since this is a Metro Transit position it needs to align with the related Compensation Group 44 salary schedule as per ordinance, and a new classification series will be created as Transit Grants Administrator 1-4 in CG 44, Range 06, 08, 10, 12, respectively. Because of reasons outlined in this memo, I recommend the Transit Accountant 3 position #3873 be recreated as a Transit Grants Administrator 4 and the employee, S. Korth, is reallocated to the new position.

The necessary resolution to implement this recommendation has been drafted.

Editor's Note:

Effective Date: 8/6/2022

Compensation Group/Range	2023 Annual Minimum (Step 1)	2023 Annual Maximum (Step 5)	2023 Annual Maximum (+12% longevity)
44/10	$ 74,139.26	$ 89,100.70	$ 99,792.68
44/12	$ 81,046.94	$ 97,848.14	$ 109,590.00

cc: Tom Lynch - Director of Department of Transportation
Justin Stuehrenberg – Metro Transit General Manager
Rachel Johnson - Chief Administrative Officer, Metro Transit
Jennifer Schiller – Transit Finance Manager
Scott Korth – Transit Accountant 3
Emaan Abdel-Halim - Human Resources Services Manager
Victoria Larson - Interim Employee and Labor Relations Manager
Erin Hillson - Human Resources Director