

TO: Personnel Board
FROM: Harper Donahue, Human Resources
DATE: August 20, 2014
SUBJECT: Planner 3

At the request of the Planning Division Director, Ms. Katherine Cornwell, I have studied the position (#4032) of Planner 2 (CG18, Range 08) currently occupied by Ms. Linda Horvath. This position is currently housed within the Neighborhood Planning, Preservation and Design section of the Planning Division and reports directly to Mr. William Fruhling (Principal Planner, CG18/R15). I have met with Mr. Fruhling and Ms. Horvath (the incumbent), and based on this meeting, a review of the position description (attached), and the City of Madison Personnel Rules, I recommend that Ms. Horvath be reclassified to a Planner 3 (CG18/R10) for the reasons discussed in this memo.

The Planner 2 class spec (attached) identifies

"...the objective level of the professional planner career progression series. Employees exercise developed expertise in the design and completion of diverse planning projects, as assigned and effectively participate in policy formulation. This work is characterized by acquired expertise in the development and application of urban and community development plans, strategies and standards. Work is performed under general supervision."

Specific responsibility may include

- "Perform all work of a Planner 1, with a higher degree of judgment and discretion.
- Exercise developed expertise in the design and completion of diverse planning projects, as assigned. Effectively participate in policy formulation. Assist in planning, scheduling, and conducting related work sessions and public meetings.
- Prepare cost estimates, preliminary plans, working drawings and specifications, and perform construction and site inspection. Provide design assistance on public improvement projects; and other development, as appropriate."

On the other hand, a Planner 3 (attached) describes

"...responsible advanced-level professional work in the development and implementation of assigned planning programs, functions and services. This is responsible, advanced level planning work. This level is characterized by ongoing responsibility for one or more planning activities, which may involve some responsibility for subordinate planners. Under general supervision, work requires a high degree of independence, judgment and discretion, and typically involves program and policy development work."

Distinguishing features between a Planner 2 and Planner 3 include:

- "... considerable discretion in the development, implementation, and direction of Planning Division program activities, including for example, conceptualizing community and redevelopment plans and strategies, developing standards, policies and ordinances for land use, conducting research and developing and maintaining data for analysis and use in long-term multi-faceted community development plans.
- Determine the components and issues to be covered by a project and prepare a project design and work schedule.
- Provide leadership to professional and technical staff. Assign, monitor and evaluate work. Assist Principal Planners and Division Director in overall supervisory role.
- Plan, schedule and conduct (interagency and intergovernmental) work sessions; public meetings; and presentations to policy-making bodies and community, neighborhood, and special interest groups as necessary to accomplish the project.

- *Draft departmental comments, recommendations, and/or position statements on major planning proposals before the City Planning Commission, the Common Council other City boards and commissions, other units of government and other development-related bodies.”*

Ms. Horvath has been with the City’s Planning Division since June 2006. In 2006, Horvath came to the City’s workforce as a Planner 1. In March of 2009, the position was reclassified to Planner 2, reflecting increased expertise, knowledge and degree of judgment and discretion exhibited by the incumbent after nearly three years of experience. The Planner 2 position generally is assigned work of a more technical nature and is performed under close supervision to support the work of lead planners. In 2010, an increase in requests for neighborhood planning services triggered the need for the incumbent to take on additional responsibilities, including:

- Professional staff support to City appointed steering committees;
- Facilitating public meetings;
- Presentations to community groups, City boards/commissions/committees and the Common Council; coordinating with property owners, various City agencies, Alderpersons, and other governmental and quasi-governmental bodies;
- Staff guidance and oversight to new planners hired in 2007 and 2008;
- The coordination and leadership of several key elements of the development review and Plan Commission administration process;
- Serving a leadership role in initiating, developing implementing a number of internal process improvements within the current Planning function; and
- Lead and/or Project Manager responsibilities on complex planning efforts
 - Emerson East-Eken Park-Yahara Neighborhood Plan
 - Arbor Hills – Leopold Neighborhood Plan
 - Health Impact Assessment Nine Springs Golf Course
 - Neighborhood Grant Program.

The work Ms. Horvath performs with the Neighborhood Planning, Preservation and Design section of the Planning Division falls within the Planner 3 description. The work currently being performed by the incumbent requires a much higher level of independent decision making responsibility, judgment, and discretion in simultaneously managing and coordinating multiple projects than what should be expected of a Planner 2. According to Ms. Horvath’s position description (attached), 60% of her time involves “advanced-level professional work” in managing and coordinating the development of comprehensive neighborhood plans. An additional 20% of her time is spent leading efforts to support neighborhood issues. As such, Ms. Horvath’s position should be recreated as a Planner 3 (CG18, R10), and she should be reallocated to the new position.

We have prepared the necessary Resolutions to implement this recommendation.

Attachments

Compensation Group/Range	2014 Annual Minimum (Step 1)	2014 Annual Maximum (Step 5)	2014 Annual Maximum +12% longevity
18/08	\$55,560	\$65,931	\$73,840
18/10	\$60,311	\$72,482	\$81,172

cc: Katherine Cornwell – Planning Division Director
 Linda Horvath – Planner 2
 Bill Fruhling – Principal Planner
 Mike Lipski – HR Services Manager