

TO: Personnel Board

FROM: Bill Wick, Human Resources Analyst

DATE: September 4, 2025

SUBJECT: Finance Department Positions

At the request of Finance Director Dave Schmiedicke, the entire agency structure was studied including a total of 29 positions. I have reviewed updated position descriptions, met with Mr. Schmiedicke and various employees, and reviewed results from the City's recent compensation study and other classifications in the City that are comparable. Upon completing my review, I am making the following recommendations, for the reasons outlined in this memo:

- Create a new classification of Assistant Finance Director in CG18, R19. Delete the classifications of Budget and Program Evaluation Manager and Accounting Services Manager in CG18, R17. Recreate the employees of the Budget and Program Evaluation Manager (C. Koh-pos. #803) and Accounting Services Manager (P. McDermott-pos. #771) classifications as Assistant Finance Directors in the new range.
- Move the classifications of Risk Manager (CG18, R15) and Treasury and Revenue Manager (CG18, R16) to CG18, R17 and reallocate the employees (E. Veum-pos. #787, and C. Franklin-pos. #4787) to the new range.
- Move the classification of Internal Audit Manager from CG18, R15 to R16 and reallocate the employee (K. Akintola-pos. #3681) to the new range.
- Move the classification of Principal Accountant from CG18, R14 to CG18, R15 and reallocate the employees (C. Johnson-pos. #786, R. Whitehead-pos. #789 and C. Lissauskas-pos. #804) to the new range.
- Create a new classification of Enterprise Program Supervisor in CG18, R14. Recreate the employees of position #4498 of Accountant 4 (M. Richards), position #4537 of Data Analyst 4 (El. Anderson), and position #4794 of Accountant 4 (Em. Anderson) in CG18, R12 as Enterprise Program Supervisors in the new range.
- Create a new classification series of Enterprise Accountant 1 and Enterprise Accountant 2 in CG18, R12 and CG18, R13, respectively. Recreate positions #777 (J. Dempsey), #783 (J. Horan), #802 (K. Quinn), #806 (J. Daniels), #4358 (D. Rey), #4580

(J. Oppeneer) as Enterprise Accountant 2s. Reallocate the employees to Enterprise Accountant 2 in the new range.

- Create a new classification series of Enterprise Analyst 1 and Enterprise Analyst 2 in CG18, R12 and CG18, R13 respectively. Recreate positions #774 (K. Dia), #784 (M. McClain), #794 (R. Mulcahy) and #3194 (R. Pennington) as Enterprise Analyst 2s in the new range. Reallocate the employee of position #3194 (R. Pennington) to ,Enterprise Analyst 1. The employees of position #774,#784, and #794 will remain in their current classifications.
- Move the classification series of Buyer 1, Buyer 2, and Buyer 3 from CG16, R15; CG16, R17; and CG16, R19, respectively, to CG16, R16; CG16, R18; and CG16, R20, respectively. Reallocate the employees of positions #769 (B. Garcia) and #801 (T. Jones) to the new Buyer 2 range and reallocate the employee of position #792 (B. Pittelli) to the new Buyer 3 range.
- Move the classification of Document Services Leadworker from CG20, R13 to CG20, R14 and reallocate the employee (J. Kaufmann-pos. #768) to the new range.
- Move the classification series of Document Services Specialist 1 and Document Services Specialist 2 from CG20, R07 and CG20, R10, respectively, to CG20, R08 and CG20, R11, respectively. Reallocate the employee of position #795 (B.Sass) to the new Document Services Specialist 2 range.
- Move the classification of Administrative Support Clerk 2 from CG20, R09 to CG20, R10. Reallocate the employees of positions #766 (Vacant) and #788 (S. Brichford) to the new range.
- Recreate position #3682 of Program Assistant 1 in CG20, R11 as Program Assistant 2 in CG20, R12 and reallocate the employee (M. Quieto) to the new range.

The Finance Department has a Finance Director with five direct reports—the Accounting Services Manager, Budget and Program Evaluation Manager, Risk Manager, Internal Audit Manager, and Treasury and Revenue Manager. Each manager supervises a workgroup of professional staff and some of the managers have paraprofessionals as well. A copy of the Finance Department org chart is attached to this file for reference. The Finance Department is a central service agency, supporting all City departments in the areas outlined above. For example, the Budget and Program Evaluation section develops the City Operating and Capital budget and oversees the centralized data team. The Accounting Services team is responsible for citywide accounting, ensuring adherence to various

Governmental Accounting Standards Board (GASB) regulations, and supporting accountants and paraprofessional accounting staff located in City departments.

Mr. Schmiedicke has asked for a comprehensive review of the agency's structure. Many of the positions in the agency have not been studied in a number of years, and most positions have taken on additional duties and responsibilities. Mr. Schmiedicke is requesting creating a structure where he has two Assistant Finance Directors, consistent with the structure of other City agencies. In addition, he is asking for a review of his department's managers and supervisors in light of the potential creation of the Assistant positions. Finally, other positions in the agency require review in light of their broad responsibility for setting or implementing citywide financial processes, or as a result of recommendations from the City's recent compensation study. I agree that a significant number of positions in the Finance Department should be reclassified for the reasons outlined below. I will first start by reviewing the manager positions, followed by the supervisor positions, and finally, the remaining positions affected by this study.

Finance Department Management

Assistant Finance Directors

As noted above, Mr. Schmiedicke has 5 managers who report to him. However, 2 of the managers are formally designated as the backup to his role—the Accounting Services Manager and the Budget and Program Evaluation Manager. Both of these positions are in CG18, R17, and have been in this same salary range since at least 2008. Although the Budget and Program Evaluation Manager was retitled in 2015 from the Budget and Audit Manager when the audit function was broken out, at that time, it was not moved into a different range. It is important to discuss the role of each position and Mr. Schmiedicke's placement in the City's salary structure when considering their appropriate title, CG and Range.

The Accounting Services Manager has broad responsibility for the City's overall accounting function, including general accounting, procurement, and oversight of the City's Enterprise Resource Planning (ERP) system. This includes interpreting and applying the many GASB standards that are promulgated on a regular basis. The GASB standards determine how the City is to manage its accounting and the Accounting Services Manager is responsible for interpreting the standards and how they will be applied throughout the City. This means not only ensuring that the Finance Department accountants have a proper understanding but also finance staff in the various City agencies. Agency finance staff rely on the interpretations from the Finance Department when applying new GASB standards. The Accounting Services Manager also oversees preparation of required financial reports, such

as the City's Annual Comprehensive Financial Report and Popular Annual Financial Report. Finally, the Accounting Services Manager has three Principal Accountants who report to them and supervise the accountants and other staff carrying out related work.

The Budget and Program Evaluation Manager is responsible for development of the City's capital and operating budgets, program evaluation, and oversight of the City's data team. The Manager sets standards and requirements for budget development and supervises a team of Administrative Analysts who work directly with the Mayor's Office to develop the City's annual Capital and Operating budgets. This includes working with and advising all City departments as they prepare their portions of the budget, coordinating outreach efforts with the community around the budget, and producing the City's budget book. The position also has significant responsibility for legislative processes, serving as staff to the City's Finance Committee and overseeing the passage of the annual budgets through the Common Council process. The team is also responsible for ongoing monitoring of the budget and City spending throughout the year. The Budget and Program Evaluation Manager also supervises the City's Data Team, which sets citywide standards for data collection and management.

Throughout the City, a number of agencies have created a structure where the agency head has designated Assistant positions who have responsibility for filling in for the agency head when required. These high-level positions also have broad responsibility for managing specific functions within the respective agencies. The Accounting Services Manager and Budget and Program Evaluation Manager play a similar role in the Finance Department, and the other managers in the Finance Department are not expected to oversee the department in the Finance Director's absence. As such, it is appropriate to create a new classification of Assistant Finance Director and delete the underlying classes of Accounting Services Manager and Budget and Program Evaluation Manager. The Finance Director will use working titles of Assistant Finance Director-Accounting Services, and Assistant Finance Director—Budget and Program Evaluation to distinguish the two positions.

The next consideration is the appropriate placement of the Assistant Finance Director classification in the salary schedule. As noted above, a number of agencies have Assistant-type positions. The highest range for these positions is in Range 17, similar to the current positions. However, these positions are found in agencies such as Engineering, Traffic Engineering, Water Utility, HR and IT. With the exception of HR and IT, the assistants in Engineering, TE, and Water are responsible for overseeing and administering within their own agency. While the positions in Finance are responsible for overseeing Finance Department operations in the absence of the Finance Director, they also have broad, citywide responsibility for circulating rules and guidelines around financial matters, as

Finance is a central-service department. Although HR and IT also have central-service responsibilities, the HR and IT Directors are in a lower salary range than the Finance Director. In fact, when looking at other departments whose agency head is in the same range as the Finance Director, most of those have their next highest-level position in ranges higher than Range 17. Notably, the Deputy City Attorney is in Range 23, the Director of PCED has 5 CG21 positions reporting to him in Ranges 18 and 20, the Director of Transportation has CG21 positions reporting to him in Ranges 23 and 21, and the Fire and Police Chiefs both have Assistant positions that are higher than a Range 17. Finally, it is important to note that until approximately six years ago, the highest position reporting to the Accounting Services Manager was the Accountant 4, which was 5 ranges lower. At that time, the Principal Accountant classification was created in Range 14 and those people were moved up. As part of this study, it is recommended that the Principal Accountant move to Range 15. This means that what was once a 5 range difference between the Manager and the next highest classification has shrunk to 2 ranges. It is my recommendation that the Assistant Finance Director classification be placed in CG18, R19. This is more in line with the next-highest level positions for other department heads in Range 23, and also retains a 4-range gap between Assistant Finance Director-Accounting Services and the Principal Accountants who that person supervises. The two employees of the Accounting Services Manager and Budget and Program Evaluation Manager positions should be reclassified as Assistant Finance Directors.

Treasury and Revenue Manager

The Treasury and Revenue Manager classification was created in CG18, R16 in February, 2019, when the City Treasurer position was moved into the Finance Department. This position is responsible for overseeing the City's investment portfolio, currently valued at approximately \$850 million. The Treasury and Revenue Manager is independently responsible for selecting how that money is invested to maximize the City's return. This position also oversees all revenue coming into the City. Since the position was studied in 2019, it has also taken on responsibility for an annual audit of the City's credit card usage. Prior to 2019, this was not being done and the City was incurring \$60,000 in annual fines. This position has now taken on the audit, working with agencies to ensure compliance with security standards and working with an external auditor on the annual audit.

Overall, the Treasury and Revenue Manager has broad responsibility for programs with a major citywide impact. When reviewing other existing classifications, the HR Services Manager and Labor and Employee Relations Manager have similar responsibilities. The HR Services Manager is broadly responsible for the City's hiring and position classification process. The HR Services Manager circulates hiring process information to all City

agencies and also works with all agencies on position studies. The Labor and Employee Relations Manager oversees bargaining with all City bargaining units, including those with meet and confer status, that covers all City agencies. The Labor and Employee Relations Manager also provides support in the areas of employee discipline and performance management, ensuring consistency across various agencies. These positions are both in Range 17. Because of the citywide impact of both the investment portfolio and the credit card audit, it is appropriate to recreate the Treasury and Revenue Manager classification and position in Range 17 and reallocate the employee to the new position.

Risk Manager

The Risk Manager position and classification were last studied in 2013 and at that time, it was determined that the classification should be appropriately placed in Range 15. The Risk Manager also has broad responsibility for overseeing the City's risk portfolio, including insurance, worker's compensation, and employee safety. The Risk Manager negotiates the City's insurance rates and coverage amounts, accounting for activities in all City agencies. The Risk Manager also has independent responsibility for negotiating settlement of claims or determining whether such claims should be heard in a formal hearing. These actions have a direct impact on the City's budget as some of these claims may be in excess of a million dollars. Finally, since 2013, the Risk Manager has taken on supervision of the Department's administrative teams. The Administrative Support team provides administrative coverage to various City agencies and requires the Risk Manager to schedule this coverage and resolve issues that may arise. The Document Services team provides centralized publishing and computer support to agencies and now reports to the Risk Manager. A new Administrative Services Supervisor, in CG18, R06, is being hired to oversee the teams and will report directly to the Risk Manager. Finally, the Risk Manager supervises the City's Safety Coordinator in CG18, R09 and another staff who provides direct support to the Risk program.

In a similar manner to the Treasury and Revenue Manager, the Risk Manager is responsible for major citywide programs that has a significant impact on the City's budget. As such, the comparables discussed above are relevant to this position as well. Therefore, I recommend recreating the Risk Manager classification and position in Range 17 and reallocating the employee to the new position.

Internal Audit Manager

The last position on the Finance Department management team is the Internal Audit Manager, also in Range 15. The Internal Audit Manager is responsible for planning, executing, and managing comprehensive internal audit programs within the City. It also

oversees the City's grant writing and accounting program. The position also works across City agencies in conducting audits and risk assessments. However, the risk assessments that this position conducts are not the same as those by the Risk Manager. The Risk Manager has broad responsibility for negotiating insurance claims, working directly with the City's external insurance carrier, recommending changes to contract language and City ordinances as it relates to insurance and indemnification, and approving settlement agreements. The Internal Audit Manager is reviewing agency risk metrics to determine their compliance with internal controls and standards. Overall, this position is more internally focused than both the Risk Manager and the Treasury and Audit Manager. It also oversees a smaller team than the other Manager positions, supervising one Accountant 4, one Accountant 3, and one Grant Writer. For these reasons, I recommend the placement of the Internal Audit Manager in Range 16, one range below the other Manager positions. This placement puts all the Manager positions above the other supervisors in the Finance Department but recognizes the more limited scope of this position as compared to the Risk Manager and the Treasury and Revenue Manager. I recommend recreating the position of Internal Audit Manager in the new range and reallocating the employee to the new position.

Finance Department Supervisors

Principal Accountants

The classification of Principal Accountant was created in 2015 in CG18, R14. The class spec describes the work as follows:

. . . highly responsible professional, managerial, supervisory, and administrative work in planning, coordinating and directing the accounting functions within the Finance department. A Principal Accountant will oversee 1) the administration of the ERP system and Principal Accounting, 2) citywide procurement and professional and technical functions on behalf of the Community Development Authority (CDA) Redevelopment and Housing Funds, or 3) payroll/benefit administration. Responsibilities within the "administration of the ERP system" include management of Capital Projects Debt Service, Special Assessment, and Tax Incremental District Funds. Within the "procurement and CDA and Housing Funds" area, responsibilities include contract formulation, negotiation and execution; oversight of complicated accounting transaction processing, internal/external financial reporting and ensuring HUD and audit compliance requirements. Responsibilities within "payroll/benefit administration" include management and directing citywide Payroll Services including processing payroll, meeting government reporting requirements, implementing labor agreements/employee handbooks and ordinances. Work is characterized by significant technical and supervisory responsibility for the development and implementation of the specified accounting area. The work is performed

under the limited supervision of the Accounting Services Manager and participates in the formulation of accounting and financial policies and procedures as part of the Finance Department's Management Team. Work is characterized by a high degree of independent judgment, discretion and considerable initiative.

Position #804 (C. Lisauskas) plans, coordinates, and directs the staff and activities of the Payroll and Benefits Accounting Services Section, administering complex financial systems with citywide impact. Since 2015, payroll accounting functions including account reconciliation and GASB reporting have been consolidated under this position, after previously having been assigned to multiple staff outside of the Payroll unit. This position is responsible for all functions of developing, implementing, testing, and training for the City's Enterprise Resource Planning (ERP) and Employee Self Service (ESS) systems in relation to Human Capital Management and Payroll Accounting. This position supervises a team of four, including one Accountant 4, one Accountant 2, and two Accounting Technician 3s.

Position #789 (R. Whitehead) plans, coordinates, and directs the accounting and procurement functions, staff, and activities of the Purchasing, Proprietary, and Governmental Accounting Sections. Work involves managing the City's Proprietary, General, Agency, and Special Revenue Funds; liaising to the Community Development Authority (CDA) including oversight of complicated accounting transaction processing, internal/external financial reporting, and ensuring Housing and Urban Development (HUD) and external audit requirements are met; manages and directs citywide accounts payable, loan reconciliations, and purchasing services; and is responsible for preparation of the City's Annual Comprehensive Financial Report (ACFR). Prior to 2019, production and publication of the ACFR had been completed by the external audit Certified Public Accountant (CPA) firm. Since 2015, this position has also taken on additional responsibilities in administration of the ERP system and related training. This position supervises a team of seven, including one Accountant 4, two Accountant 3s, one Buyer 3, two Buyer 2s, and one Account Clerk 3.

Position #786 (C. Johnson) plans, coordinates, and directs the accounting functions, staff, and activities of the Governmental Accounting Section. Work involves managing and overseeing the City's ERP system, including providing citywide training and support, testing, and overseeing and implementing upgrades, service packs or add-ons to the system's software; management of capital projects including Tax Increment Financing (TIF) and special assessments, capital assets, debt service fund, leases, Subscription-Based Information Technology Arrangements (SBITA), accounts receivable, and ambulance conveyance billing functions. Since 2015, additional responsibilities assigned to this position include management of all aspects of the MUNIS ERP system that went live in

2015; greater oversight and management of accounts receivable functions, including year-end reconciliation for all funds, responding to any audit inquiries, ensuring timely setup and maintenance of customer records, and oversight of annual setup and maintenance of account codes and charge codes; managing, implementing, and creating policies and procedures for new Governmental Accounting Standards Board (GASB) pronouncements; and creating schedules and footnotes for the ACFR. This position supervises a team of seven, including three Accountant 4s, one Accountant 3, one Accountant 2, and two Accounting Technician 3s.

The request is to review whether their range 14 placement remains appropriate. All three positions have taken on additional responsibilities since the original placement, as noted above. In addition, the manager positions above them are all moving up, providing room for this classification to be increased without significantly affecting wage compression issues. Other principal positions, such as Principal Planner, Principal Architect, and Principal Engineer 1 are in Range 15. Finally, the compensation study recently conducted by the City and Baker Tilly found that the Principal Accountant classification would be more appropriately classified in CG18, R15. As such, I recommend that the Principal Accountant classification and positions should be deleted in CG18, R14 and recreated in CG18, R15, with the employees of the related positions reallocated to the new range.

Enterprise Program Supervisors

Position # 4498 (M. Richards) of Accountant 4, under the working title of Procurement Supervisor, directly supervises the Purchasing and Procurement team, including one Accountant 3 (CG18, R10), one Buyer 3, and two Buyer 2s. Position #4537 (El. Anderson) of Data Analyst 4 directly supervises the Data and Innovation team, including two Data Analyst 3s (CG18, R10). Position #4794 (Em. Anderson) of Accountant 4 directly supervises a team consisting of one Accounting Technician 3 (CG20, R16) and two Accounting Technician 2s (CG20, R14) in the Treasury and Revenue section. Each of these positions oversees an enterprise-level program requiring the coordination and leadership of inter-agency group efforts.

In 2017, the vacant Procurement Supervisor position was reclassified as an Accountant 4; the position had previously been classified as an Accountant 3 with a working title of Procurement Supervisor. The 2017 memo to the Personnel Board recommending reclassification to Accountant 4 noted, "This position will continue to supervise the professional staff of the Purchasing section and will continue to lead the implementation and training efforts for the MUNIS Bid Central and Vendor Self-Service applications expected LIVE in the third quarter of 2017. In addition, this position will continue work to meet new OMB A-133 grant procurement compliance procedures that are effective January

1, 2017. The supervision of these two major accounting initiatives and staff are in line with the class specification for Accountant 4. The position description also describes various programs in which there is supervision and oversight including the City Purchasing Card Program, Procurement Training, City Contracting, the City's financial statements and reporting requirements, Procurement User Group, and accounting and procurement financial system applications." Since 2021, the position has seen an increase in cross-agency and citywide collaboration and has taken on supervision of the procurement responsibilities of a staff member from another agency. This position functions as the subject matter expert representing Procurement in various City user groups and committees.

The Data Analyst 4 class was created in 2019, as part of a Data Analyst 1-4 class series. The class spec does not include specific mention of supervisory responsibilities; however, this position now directly supervises two Data Analyst 2s (CG18, R08) and is responsible for recruitment, hiring, and onboarding activities; day-to-day supervision; completion of performance reviews; and responsibility for disciplinary action. Additionally, this position leads multiple citywide work groups and initiatives, including the cross-agency data governance team responsible for developing citywide policies; the data steward program created in 2023, which engages staff from all City agencies for collective data improvement efforts; cross-functional work groups on specific topics, with recent examples including a steering team for a mapping tool and methodology to identify equity areas and a steering team for a citywide data training pilot; and Results Madison, a multi-year citywide data engagement effort.

In 2023, position #4794 was recreated from Accountant 3 in CG18, R10 to Accountant 4 in CG18, R12 due to the position directing and leading large implementation projects, including overseeing training, testing, and implementation. The 2023 memo recommending reclassification to Accountant 4 noted, "Projects have included implementation of the property tax module with the City's Enterprise Resource Planning (ERP) system. This is the only Accountant position within the Treasury Section of the Finance Department and assignment of complex projects to the position improves efficiency and effectiveness within the work unit." This position serves as the subject matter expert for several ERP functions, including cashiering, business licensing, and the property tax system and is responsible for liaising with the Information Technology department, other Finance Department staff, Tyler Technology staff, and other outside vendors, including to review ERP module functionality, test, and recommend use or changes. This position is responsible for maintaining the property tax module within the ERP and for coordinating and managing the Payment Card Industry (PCI) assessment for the City, including creating and updating policies and procedures for PCI compliance and training staff across multiple

agencies on those policies and procedures, in addition to supervising the aforementioned Accounting Technician positions.

Creating a new classification of Enterprise Program Supervisor in CG18, R14 more appropriately recognizes the breadth and depth of knowledge and skill necessary to effectively perform the work of these positions and to support the related functions performed by staff in other City agencies. Recreating these CG18, R12 supervisory positions in CG, R14 also reflects the added complexity and responsibility in leading and overseeing programmatic functions with a citywide impact. Further, as noted below, the Accountant 4 and Analyst 4 classifications in Finance are being reviewed and recommended for recreation in Range 13 as part of a progression recognizing the citywide impact of this work from the Finance Department. Placing the supervisor at a range higher than the people they supervise is appropriate, but also retains placement a range below their direct supervisors in Range 15. Therefore, I recommend creating the new classification of Enterprise Program Supervisor in CG18, R14, recreating the positions referenced above as Enterprise Program Supervisor, and reallocating the employees to the new positions.

Enterprise Accountants and Enterprise Analysts

There are currently six additional Accountant 4 positions in the Finance Department, classified in CG18, R12 that do not have supervisory responsibility. Positions #777 (J. Dempsey), #783 (J. Horan), #802 (K. Quinn), #806 (J. Daniels), #4358 (D. Rey), and #4580 (J. Oppeneer) have no formal supervisory responsibility.

There are currently three Administrative Analyst 4 positions, classified in CG18, R12 that do not have supervisory responsibility. Position #3194 (R. Pennington) is filled at the budgeted level. Position #784 (M. McClain) is underfilled as an Administrative Analyst 3 and position #774 (K. Dia) is underfilled as an Administrative Analyst 2. These positions report to the Budget and Program Evaluation Manager, who expects that with experience and taking on additional responsibilities, all employees in the Administrative Analyst class series should eventually advance to the Administrative Analyst 4 level.

The request in this study is to determine whether the work of the Accountant 4 and Admin Analyst 4 specifically within the Finance Department remains appropriately classified in Range 12. Although currently the Administrative Analyst 4 classification is only used in the Finance Department, other agencies have employees in levels 1-3. In addition, there are Accountant 4s in certain agencies, like the Water Utility, who have agency-specific roles but not the broad perspective found in the Finance Department. The compensation study found that moving the Administrative Analyst 4 class to CG18, R13 is appropriate. However,

instead of just moving the classification of Administrative Analyst up a range, given the complexity and citywide scope of the work, it is appropriate to consider a series of Enterprise Analyst 1-2, in CG18, R12 and 13. This series would allow for someone to promote from a different City agency into the Range 12 level and then once the person has gained the citywide perspective and is functioning at the higher level that requires, advancement to the Range 13 would be possible.

Creating a classification series of Enterprise Accountant 1 (CG18, R12) and Enterprise Accountant 2 (CG18, R13) would maintain internal equity between the Accountant and Administrative Analyst functions. This would also recognize the complexity of the accounting work in the Finance Department supporting citywide functions versus the Accountant 4 classification that may only be working within a specific department.

Creation of the Enterprise Accountant and Enterprise Analyst classification series recognizes the greater complexity and broader scope of work performed by central service agencies when compared with the work performed by non-central agency staff within the Accountant 1-4 classification series. I also recommend recreating the six Accountant 4 positions referenced above as Enterprise Accountant 2 in CG18, R13, and reallocating the employees to the new range. I recommend recreating the three positions of Administrative Analyst 4 as Enterprise Analyst 2, in Range 13, and reallocating Ryan Pennington to the level of Enterprise Analyst 1. The other two employees will continue to underfill in their current classification and range.

Paraprofessional, Administrative, and Clerical Positions

Because we are reviewing the Finance Department both in conjunction with changes in structure, duties and responsibilities, and relative to the market data received as part of the compensation study, certain positions in CG16 and 20 were also reviewed. Most of the recommended movement for these positions is based on the market data we received but other considerations will be discussed below.

Buyers

Position #792 (B. Pittelli) is classified as Buyer 3 in CG16, R19. This position performs professional advanced-level procurement work in the Purchasing Section. Work involves providing centralized purchasing services for City agencies, including leading cross-agency projects. The compensation study found that movement to range 20 is appropriate based on market data.

The Buyer 1-3 series is structured to provide career advancement from entry-level Buyer 1 to journey-level Buyer 2 as a function of fully developed expertise, normally occurring after two years as a Buyer 1. Progression to Buyer 3 is not anticipated for all positions, is based

on work assignments and the needs of the Finance Department, and is normally achieved through a competitive process.

Positions #769 (B. Garcia) and #801 (T. Jones) are classified as Buyer 2 in CG16, R17. Anchoring this classification two ranges below Buyer 3 to maintain consistency is recommended, which would result in movement to CG16, R18.

The Buyer 1 classification is currently in CG16, R15. Movement to CG16, R16 to maintain a two-range difference with the Buyer 2 class is recommended for consistency.

In addition to moving the classification to the new ranges, I recommend recreating the respective positions in the new ranges and reallocating the employees to the new positions. At a later date, these positions should be reviewed to determine whether they are more appropriately placed in CG18, with other professional positions, but that is not a part of this study.

Document Services

Position #768 (J. Kauffman) is classified as Document Services Leadworker in CG20/R13. The compensation study found that movement to range 14 is appropriate. The class spec describes the work as, " . . . responsible and varied lead-level work in overseeing the operations and services of the City's centralized Document Services Unit. This level is distinguished by placing emphasis on leadership, interagency communication and technical support, including directing and overseeing the work of the Document Service Specialists. Work also includes utilizing and supporting diverse document generating software applications for all City agencies involving independence and creativity in both: generating written/graphic presentations; and developing, integrating, and maintaining related databases both within the unit and throughout the organization as required. Work is performed under the general supervision of the Risk Manager." With restructuring of supervisory responsibilities in the Finance Department, this position will report to the Administrative Services Supervisor (CG18, R06) upon that position being filled through a competitive recruitment. Placement in Range 14 would also be comparable to the Administrative Assistant classification, in the same range.

Position #795 (B. Sass) is classified as a Document Services Specialist 2 in CG20/R10. The Document Services Specialist 1 (CG20/R07) and 2 class series is structured to provide career advancement from the 1 level to the 2 level as a function of increased experience, independence, and skill in using the various computer programs associated with the work, normally after two years. The work performed by the Document Services Specialist 2 class is more appropriately aligned with work performed by the Program Assistant 1 class in CG20, R11, so movement of this class to range 11 is recommended. Anchoring the

Document Services Specialist 1 class three ranges below Document Specialist 2 to maintain consistency with the current range spread is recommended, which would result in Document Services Specialist 1 classification moving to CG20, R08.

Based on the above, I recommend recreating the position of Document Services Leadworker in the new range and reallocating the employee to the new position. I also recommend recreating the position of Document Services Specialist 2 in the new range and reallocating the employee to the new position. Finally, I recommend recreating the classification of Document Services Specialist 1 in CG20, R08.

Administrative Support Clerks

Positions #766 (vacant) and #788 (S. Brichford) are classified as Administrative Support Clerk 2 in CG20, R09. Compensation study market data supports movement to range 10. These positions require a greater breadth of knowledge with a citywide scope, as they must be able to support a wide range of administrative functions across multiple agencies in the absence of staff who typically perform those duties. Placement in range 10 is also a range below the Document Services Specialist 2, which is appropriate because even though the Administrative Support Clerks are expected to work in various City agencies with familiarity with a broad range of computer programs, the depth of knowledge required is not the same as the Document Services Specialist. Therefore, I recommend moving the classification of Administrative Support Clerk 2 to CG20, R10, recreating the existing positions in the new range and reallocating the employees to the new position. Furthermore, in order to preserve the current 3 range spread of the progression series, I recommend recreating the classification of Administrative Support Clerk 1 in CG20, R07, and deleting it in Range 06.

Position #3682 (M. Quieto) is classified as Program Assistant 1 in CG20, R11. This position currently reports directly to the Risk Manager, but will begin reporting directly to the Finance Administrative Services Supervisor (CG18, R06) once that vacant position is filled. Position #3682 was reclassified from Administrative Support Clerk 2 in CG20, R09 in May 2018. This position functions as part of the Administrative Support Team based in the Finance Department; additionally, the 2018 memo recommending reclassification to Program Assistant 1 stated, "Mr. Quieto has held increasing programmatic authority within the City Clerk's Office providing election support. Programmatic responsibilities include but are not limited to the scheduling, training, communications and payroll for poll workers. In addition, Mr. Quieto is the creator of an election worker SharePoint database and continues to provide ongoing maintenance and updates to the database. He's also trained the City's Clerks Office staff on how to use the database. The Clerk's Office relies on the administrative support provided by Mr. Quieto on a frequent and regular basis. Even when he is not physically in the Clerk's Office, he can send notices and update the

database from any City agency he's supporting." This position continue to perform those programmatic functions relative to support of the Clerk's Office, while also adding structure to processes in other City agencies and committees including the CDA Housing Division and Police and Fire Commission, along with providing training and leadership to the Administrative Support Clerks. Recreating this position in CG20, R12 would also maintain the existing 2-range difference above Administrative Support Clerk 2 following movement of that classification from CG20, R09 to CG20, R10.

The necessary Resolution has been prepared to implement these recommendations.

Editor's Note: Effective Date: January 7, 2024

Compensation Group/Range	2025 Annual Minimum (Step 1)	2025 Annual Maximum (Step 5)	2025 Annual Maximum +12% longevity
18/19	\$126,565.14	\$151,801.00	\$170,017.12
18/17	\$115,238.24	\$138,978.06	\$155,655.50
18/16	\$110,173.18	\$132,770.30	\$148,702.84
18/15	\$105,118.52	\$126,565.14	\$141,753.04
18/14	\$100,326.72	\$120,778.84	\$135,272.28
18/13	\$95,794.66	\$115,238.24	\$129,066.86
18/12	\$91,258.70	\$110,173.18	\$123,393.92
16/20	\$80,800.72	\$94,663.40	\$106,023.06
16/19	\$77,939.68	\$90,935.26	\$101,847.46
16/18	\$75,396.36	\$87,200.36	\$97,664.32
16/17	\$72,698.60	\$83,887.18	\$93,953.60
16/16	\$70,447.78	\$80,800.72	\$90,496.90
16/15	\$68,884.92	\$77,939.68	\$87,292.40
20/14	\$63,512.80	\$70,447.78	\$78,901.42
20/13	\$61,779.38	\$68,884.92	\$77,151.10
20/12	\$59,727.72	\$66,908.16	\$75,017.80
20/11	\$58,292.00	\$65,248.30	\$73,078.20
20/10	\$56,381.26	\$63,512.80	\$71,134.44
20/08	\$53,351.48	\$59,727.72	\$66,895.14
20/07	\$52,238.68	\$58,295.12	\$65,290.42

Cc: Dave Schmiedicke – Finance Director
Erin Hillson – HR Director
Emaan Abdel-Halim – HR Services Manager
Kurt Rose – Employee and Labor Relations Manager
Dan Rolfs – MPSEA President

AFSCME Local 6000