



Department of Human Resources

INTER-OFFICE COMMUNICATION

Date: February 16, 2024

To: Marcelia Nicholson, Chairwoman, Milwaukee County Board of Supervisors

From: Margo Franklin, Chief Human Resources Officer, Department of Human Resources
Erika Bronikowski, Retirement Plan Services Director

Subject: From the Chief Human Resources Officer, Department of Human Resources, requesting approval to abolish 1.0 FTE Deputy Director– Pay Range 37M and create 1.0 FTE Retirement Assistant - Pay Range NR16

File Type: Action Report

REQUEST

A report from the Chief Human Resources Officer and Retirement Plan Services Director, Department of Human Resources, respectively requesting approval to abolish 1.0 FTE Deputy Director– Pay Range 37M and create 1.0 FTE Retirement Assistant - Pay Range NR16.

POLICY

Wisconsin State Statutes:	Wis Stats 59.17
Milwaukee County Code of General Ordinances:	MCGO 17.05(1)
Specific Adopted Budget:	2024 Adopted Budget

BACKGROUND

The Department of Human Resources (DHR) is looking to abolish the Deputy Director of Retirement Plan Services and create one additional Retirement Assistant position.

Retirement Assistants receive and process incoming requests related to the pension. Incoming requests are typically received via phone call, e-mail, mail, fax, and in-person requests. In recent years, RPS has seen a steady increase in incoming requests: 11,500 in 2020, 15,200 in 2021, 17,800 in 2022, and 25,200 in 2023. In 2023, RPS answered 82% of calls live.

In 2020, the Retirement Plan Services (RPS) team had three Retirement Assistant FTEs (formerly known as Clerical Specialists) however, one was left vacant due to the pandemic related hiring freeze. RPS currently has two Retirement Assistant FTEs and has been using temporary, contracted staff to fill the third Retirement Assistant position. The temporary, contracted Retirement Analyst position has had significant turnover: temporary staff has lasted, on average, 4.8 months. Full-time employees in the same role have an average tenure of over 2.5 years.

We are requesting to abolish the Deputy Director position and create a third Retirement Assistant position for the following reasons:

- to ensure RPS can address incoming member requests timely;
- to reduce the cost of temporary staffing that is paid out of the pension fund;
- to reduce turnover and relieve the team of the significant investment of near-constant onboarding; and
- to eliminate the need for Retirement Analysts to assist in back up helpline coverage so they can focus their time on completing pension calculations.

The duties of the Deputy Director role can be completed by other RPS leadership team members.

ALIGNMENT TO STRATEGIC PLAN

Describe how the item aligns to the objectives in the [strategic plan](#):

3B: Enhance the County's fiscal health and sustainability

Creating a third Retirement Assistant FTE to replace a temporary, contracted Retirement Assistant is expected to significantly reduce turnover in the role, which will reduce the time spent on onboarding. It also eliminates the need for contracted staff to do that work so the expenses paid out of the pension fund for contracted staff will be reduced approximately \$60,000.

Additionally, eliminating the Deputy Director and creating a Retirement Assistant position will provide cost savings to Milwaukee County because the Deputy Director role has a higher salary.

FISCAL EFFECT

The new Retirement Assistant is expected to be filled as of pay period 09 2024 (April 14, 2024) for a decrease in personnel costs of approximately \$69,613.00 including social security, for the current year.

POSITION INFORMATION

Action	Title	Pay Range	Annual Salary Range (without SS)
Abolish	Deputy Director	37M	\$95,343 - \$113,395
Create	Retirement Assistant	NR16	\$18.39 to \$27.58 per hour

VIRTUAL MEETING INVITES

Margo.Franklin@milwaukeecountywi.gov

PREPARED BY:

Margo Franklin, Chief Human Resources Officer, Department of Human Resources

APPROVED BY:

Margo Franklin, Chief Human Resources Officer, Department of Human Resources

ATTACHMENTS:

Resolution

Fiscal Note

DHR Report

Job Evaluation Questionnaire (JEQ)

OSBP Report (Office of Strategy, Budget and Performance)

cc: Kelly Bablitch, Chief of Staff, Milwaukee County Board of Supervisors
 Janelle M. Jensen, Legislative Services Division Manager, Office of the County Clerk
 Mary Jo Meyers, Chief of Staff, Milwaukee County Executive's Office
 Joe Lamers, Director - Strategy, Performance & Budget
 Supervisor Willie Johnson Jr., Chair, Personnel Committee
 Personnel Committee Members
 Steve Cady, Research & Policy Director, Office of the Comptroller
 Allyson Smith, Committee Coordinator, Office of the County Clerk
 Tracy Castillo, Associate Accountant, Central Business Office
 Amy McKinney, CBO Finance Manager, Central Business Office
 Josh Scott, Budget and Management Analyst, Strategy, Performance & Budget