



MARATHON COUNTY HUMAN RESOURCES, FINANCE & PROPERTY COMMITTEE MEETING **AMENDED**

AGENDA

Date & Time of Meeting: **Tuesday, August 11, 2020 3:30 p.m.**

Meeting Location: **Marathon County Courthouse, County Board Assembly Room 500 Forest Street, Wausau WI 54403**

Members: John Robinson, Chair, Alyson Leahy, Vice-Chair, Jonathan Fischer, EJ Stark, Kurt Gibbs, Yee Leng Xiong, Craig McEwen

Marathon County Mission Statement: Marathon County Government serves people by leading, coordinating, and providing county, regional, and statewide initiatives. It directly, or in cooperation with other public and private partners, provides services and creates opportunities that make Marathon County and the surrounding area a preferred place to live, work, visit, and do business. (Last updated: 12/20/05)

Human Resources, Finance & Property Committee Mission/Purpose: Provide leadership for the implementation of the County Strategic Plan, monitoring outcomes, reviewing and recommending to the County Board policies related to the human resources initiatives, finance and property of the County.

The meeting location identified above will be open to the public. However, due to the COVID-19 pandemic and associated public health directives, Marathon County encourages Human Resources, Finance and Property Committee members and the public to attend this meeting remotely. To this end, instead of attendance in person, Committee members and the public may attend this meeting by telephone conference. If Committee members or members of the public cannot attend remotely, Marathon County requests that appropriate safety measures, including adequate social distancing, be utilized by all in-person attendees.

Persons wishing to attend the meeting by phone may call into the telephone conference beginning five (5) minutes prior to the start time indicated above using the following number: **1-408-418-9388**

Access Code: **146 078 0067 Password: **none****

If you are prompted to provide an “Attendee Identification Number,” enter the “#” sign. No other number is required to participate in the telephone conference. When you enter the telephone conference, PLEASE PUT YOUR PHONE ON MUTE!

1. Call to Order-Please silence your cellphones
2. Public Comment
3. Approval of the Minutes of the July 21, 2020 Human Resources, Finance and Property Committee Meeting
4. Educational Presentations/Outcome Monitoring Reports-
 - A. Presentation by Community Partners Campus Group
 - B. Preliminary Equalize Value, Net New Construction and County Apportionment Data from the Wi DOR
 - C. **Overview of 2020 Budget Implications due to COVID 19 related items-Sales and Property Tax Collections**
 - D. 2021 New Position Requests received by Administration – 2021 Chart
5. Policy Issues Discussion and Possible Action by Committee to Forward to the County Board
 - A. Receipt of Routes to Recovery Allocations from Other Units of Government for the Purpose of Funding Eligible Broadband Project and/or Services
 - B. Direction of Use of \$56,052 for Start-up Funds for Broadband Expansion
6. Operational Functions required by Statute, Ordinance, or Resolution:
 - A. Discussion and Possible Action by Committee to Forward to the County Board for its consideration
 1. Interdepartmental Budget Transfers
 2. Create 1.0 FTE Administrative Assistant, (Health & CPZ collaboration) effective first full pay period after approval. (Frisch & Matel)
 3. Create 2.0 FTE Social Service Specialists, Social Services effective first full pay period after approval. (Tylka & Matel)
 4. Resolution Providing for the Sales of Not to Exceed \$17,845,000 General Obligation Health Care Project Building Bonds, Series 2020B
 - B. Discussion and Possible Action by Human Resources and Finance and Property Committee
 1. Approve Claims and Questioned Costs – July 2020
 2. Presentation of 2021 Ranked CIP Projects by County Administrator Leonhard (forwarded from the CIP Committee)
 3. Possible Tax Deed
 - a. 211 Main Street Mosinee, WI (PIN 251-2707-295-1066)
 4. 2021 Reclassification and Job Evaluation Requests – 2021 Chart:
 - a. Administrative Supervisor (Register in Probate, Court Services Supervisor, Administrative Supervisor), Clerk of Courts
 - b. Administrative Specialist (Deputy Register in Probate); Clerk of Courts
 - c. Medical Examiner, Medical Examiner’s Office
 - d. Waste Management Specialist (Environmental Gas Technician), Solid Waste

7. Announcements (Next Meeting Date and Topics)

A. Next Meeting Date – August 25, 2020, 4:00pm

B. Topics to discuss: 2020/2021 Economic Outlook Updates, 2021 Budget update-Equalized Value, Levy Limits, Net New Construction-final

8. Adjourn

Any person planning to attend this meeting who needs some type of special accommodation in order to participate should call the County Clerk's Office at 715 261-1500 or e-mail infomarathon@mail.co.marathon.wi.us one business day before the meeting.

Faxed to: Wausau Daily Herald
Faxed to: City Pages
Faxed to: Record Review
Faxed by/time: K Palmer 8/10/2020 12:45 pm

Posted to the County Website:

SIGNED J ROBINSON/s/K Palmer

Presiding Officer or Designee

NOTICE POSTED AT THE COURTHOUSE

By/Date/Time K Palmer 8/10/2020 12:45 pm

www.co.marathon.wi.us



MARATHON COUNTY HUMAN RESOURCES, FINANCE & PROPERTY COMMITTEE MEETING MINUTES

Date & Time of Meeting: **Tuesday, July 21, 2020 4:00 p.m.**

Meeting Location: **Marathon County Courthouse, County Board Assembly Room 500 Forest Street, Wausau WI 54403**

Members: John Robinson, Chair, Alyson Leahy, Vice-Chair, Jonathan Fischer-4:15, EJ Stark, Kurt Gibbs, Yee Leng

Xiong-excused, Craig McEwen

Others: Kristi Palmer, Scott Corbett, Jeffery Schroeder-PFM, Jessica Schneider-PFM, Kathleen Walters-PFM, Brain Kowalski, Meg Ellefson, John Rader -Baker Tilly

1. Chairman Robinson called the meeting to order at 4:00 pm
2. Public Comment Portion of the Agenda has been temporarily suspended, pursuant to Marathon County Resolution #R29-20, dates April 21, 2020, because the technology necessary to afford the public the opportunity to address the County Board, its subgroups, during public comment is difficult to guarantee, if a large number of individuals have elected to call in.
3. Approval of the Minutes of the July 7, 2020 Human Resources, Finance and Property Committee Meeting Motion by McEwen and seconded by Leahy to approve the July 7, 2020 minutes; vote unanimous
4. Educational Presentations/Outcome Monitoring Reports
 - A. Presentation on the County's Investment Portfolio and the Current Economic Environment-Kathleen Walters and Jessica Schneider from PFM –Discussion on the County's Investment portfolio and the current investment environment. The County is exceeding its benchmarks in both portfolios.
 - B. Marathon County Financial Highlights-John Rader from Baker Tilly LLC –Discussed the 2019 financial highlights from the Marathon County Financial Statements. Follow up request Baker Tilly to look at financing options for Highway Infrastructure costs from other Wisconsin Counties.
 - C. COVID-19 Financial Impact and Reimbursement Efforts –Update on the grant opportunities and reimbursement for COVID grant expenditures. The County has submitted its first Road to Recovery reimbursement request in July. Request by Robinson to place this agenda item on the educational meeting agenda for future meetings.
5. Policy Issues Discussion and Possible Action by Committee to Forward to the County Board
 - A. None
6. Operational Functions required by Statute, Ordinance, or Resolution:
 - A. Discussion and Possible Action by Committee to Forward to the County Board for its consideration
 1. None
 - B. Discussion and Possible Action by Human Resources and Finance and Property Committee
 1. 2021 Budget Timeline-Determine dates and times for 2021 Budget
The County Administrator's budget will be presented on October 6. The action meeting would be either October 13 or the 19. This would allow for publishing the 2021 Budget and have the 2021 Budget Public Hearing on November 5. Would you like the Voting meeting on October 13 or 19? Would you like the public hearing to occur on November 5? Gibbs recommendation-County Administrator to present on October 6 and the HRFC reconvene and approve the budget on October 13th. The Committee will complete a presentation of the budget to the County Board on October 15. (If needed have a fall back date of October 19 for the Committee to approve the budget). The public hearing will be on November 5 at 7 pm and the final budget adoption will be on November 10. Motion by Gibbs and McEwen to present the 2021 Budget on October 6 and reconvene on October 13 to consider amendments and approve the budget and forward to the County Board. The Budget Hearing will be on November 5 and the County Board will approve the 2021 budget on November 10; vote unanimous
7. Announcements (Next Meeting Date and Topics)- Next Meeting Date –August 11, 2020, 3:30p
8. Adjourn-motion McEwen and seconded by Fisher to adjourn at 5:15 pm



Community Partners Campus, Inc.
500 N. First Street, Suite 8000
P.O. Box 8050
Wausau, WI 54402-8050

Contacts:

Mr. Brian L. Gumness, (715) 218-7970, brian@greenheckfoundation.org

Mr. Kevin Noel, (715) 551-7429, knoel2home@aol.com

Ms. Amy E. Ebeling, (715) 845-4336, aebeling@ruderware.com

Strategic Planning Committee:

David Bliven

Jeffrey Todd

Ken Tokarz

Amy Ebeling

Kevin Noel

Brian Gumness

Barbara Brown



Community Partners Initiative

"The true measure of any society can be found in how it treats its most vulnerable members." - Gandhi

Community Partners Campus (CPC) is a newly formed 501 (c) (3) Corporation whose sole purpose is to develop and operate a shared space nonprofit center. The CPC intends to lease space and provide services to other tax-exempt organizations at below market rates thereby building a community in which charitable, educational, medical and social services can be more efficiently administered to the Marathon County area individuals and families in need.

Our vision includes the acquisition of a facility housing 8 – 15 nonprofit partners having a mission driven purpose to serve disadvantaged families and individuals in a single location. The mission of CPC is to help our community nonprofits meet client needs with an emphasis on food, clothing, shelter, medical, mental health and social well-being.

Community Partners Campus goal: ***Support the efforts of community nonprofit partners by offering functional, collaborative, shared space facilities housing organizations having a mission driven purpose to serve disadvantaged individuals and families of Marathon County with basic needs in a single location.***

In addition to providing more services to more people, CPC allows partners to focus efforts on their missions without the distractions of owning their own building or renting a facility at market rate. Finally, CPC will benefit the entire community by reducing tax dollars spent within the medical, legal, law enforcement and educational systems by providing the services families and individuals need under one roof.

At the time of this writing the need for this Campus has never been greater. Unemployment is surging and will result in more homeless; people are hungry and food banks are facing unprecedented demand from a limited food supply. This is not our effort but the effort of a community. We are asking for your help and guidance to make Community Partners Campus a reality in Marathon County. We're in this together.

Respectfully,

Community Partners Campus, Board of Directors



Community Partners Campus Marathon County Impact

The partners of Community Partners Campus: The Neighbors Place, Catholic Charities, The First Presbyterian Free Clinic, Blessings in a Backpack, North Central Community Action Program and other related services, serve all of Marathon County. Their outreach goes beyond the City of Wausau to encompass all of Marathon County and a good amount of commerce and activity comes from these services being located here. Of the many employees that work for the Marathon County government, not all live in the City of Wausau, a fair percentage live throughout all of the County. While many of the county's largest employers are in Wausau or the Greater Wausau area, their employee base stretches to all ends of Marathon County. Why is this important to recognize? Because all of these people benefit from going to the immediate Wausau area to work every day, so what happens in Wausau is also important to them. Above all else, the Marathon County Government is and should be a good partner to all municipalities located within the County so we can strengthen each other and our residents through collaboration in services as well as garnering additional resources. The City of Wausau would naturally be the largest partner.

Many of the CPC partners collect demographics on the people they serve. Because of that, they are able to track the communities throughout the County where their clients live. They often report by zip code, thus have data showing where in the County people live to obtain the services provided. However, in these reports please be mindful that 54403 and 54401 both report as Wausau, but it doesn't necessarily mean the services were provided in the City. The townships closest to the city are considered a Wausau address. For example: Town of Rib Mountain, Town of Texas, Town of Maine, Town of Stettin, Town of Wausau, etc. The end result places more weight on the City of Wausau for these services than there truly is.

North Central Community Action Program (NCCAP): The following is a summary of services for the first 6 months of 2020, amid the Pandemic. Through their services they have expended a total of over \$900,000 in Marathon County.

Weatherization (furnaces, water heaters, insulation, energy saving appliances, etc.): These services total over \$396,000 for 45 homes weatherized. Please note that limited services were provided during the months of March, April, and May. Location of homes weatherized; **City of Wausau 28**; other locations in **Marathon County 17**.

Through Wisconsin Rental Assistance Program (WRAP): NCCAP has assisted 143 households in Marathon County with \$151,176 in emergency rent assistance in June and July to prevent evictions. (This funding is only available to Community Action Agencies) **76 of these households are located in the City of Wausau** and the remaining **67 households are located throughout Marathon County** in Spencer, Stratford, Weston, Abbotsford, Athens, Colby, Edgar, Hatley, Mosinee, Rothschild, and Schofield. They will continue these efforts as well as serving many households with emergency funding from the City of Wausau and the State of Wisconsin through their emergency COVID-19 Community Services Block grant.

North Central Community Action Program, Inc. is the Lead Agency for Marathon County. As the Lead, they are able to assist other agencies with grant opportunities and are the fiscal agent for our Emergency Shelter Grant, Housing Prevention Grant, and the Emergency Housing Assistance grant from the United Way. They provide administrative, program, and fiscal services for their partners: Catholic Charities, The Women's Community, and The Salvation Army. What follows are the amounts for each and their breakouts.

Emergency Housing Assistance Fund (EHAF); 69 households served \$28,045 --**41 in Wausau, 28 other Marathon County communities;** in addition, these agencies also provided housing assistance: Catholic Charities 12 households \$4,949; Salvation Army 16 households \$7,865; Women's Community 16 households \$10,140 however, they did not report the locations of sub-recipients.

Emergency Shelter Grants to Catholic Charities and The Salvation Army in the amount of \$33,500 (in the City of Wausau, but all of their clients don't necessarily come from the city).

Housing Prevention (longer term help by NCCAP) \$23,757 in rental assistance for **12 households; 8 Wausau 4 other Marathon County communities.**

TBRA- Tenant Based Rental Assistance (this is assistance for families which can go up to two years and is based on the households' income-NCCAP) \$33,350 was provided for **11 households, 7 Wausau, 5 other Marathon County communities.**

The Neighbors Place is the largest food pantry in Marathon County and they work closely with the Marathon County Hunger Coalition to increase food security throughout the County. They currently have the capacity to act like a food bank, storing and distributing food to more than 20 food pantries, as well as other nonprofits, faith-based groups and schools.

About **425 families** from throughout Marathon County visit their food pantry every week. Visitors, must show proof of residence in Marathon County. They then receive a certain number of items (based on their family size) and can visit the pantry twice per month. Over the past year, starting in August of 2019, there had been **17,293 visits of which 69% check in using City of Wausau zip codes** while the balance of **31% were from the remaining zip codes throughout Marathon County.**



The Free Clinic of First Presbyterian Church, Wausau

The Free Clinic came into being in early 2018 after Dr. Jeffrey Oswald (a board-certified family physician with Marshfield Clinic) and Larry Meyer (construction), both serving on the Salvation Army board, approached the church Mission Team about the possibility of the church sponsoring the clinic. The SA had inadequate space and expertise to take on such a venture, while FPC had a decades long history of feeding ministries, refugee support activities, parish nursing and the like in a downtown location. The church Session enthusiastically accepted the challenge, and Jeff Todd, a retired Aspirus medical group practice administrator and former county public health officer, accepted the role of volunteer clinic manager. The church believed that offering free health care to local residents who were uninsured and living in poverty was an important ministry to be involved with. The fact all services were to be provided by highly skilled but unpaid volunteer healthcare providers made the effort all the more laudable. Originally, the clinic was to be housed on the lower level of the church, in 2,500 square feet of remodeled space the church was willing to donate. The clinic would be adjacent to the Fellowship Hall where Sunday Community Suppers have been served to local residents and homeless individuals for 15+ years. Architect Rod Cox was contracted to develop the plans. A capital fund raising initiative began almost immediately.

Shortly thereafter, the concept of a ***Community Partners Campus***, housing a number of critical community health and social service agencies, was developed. FPC was invited by Brian Gumness and Kevin Noel, to consider locating the Free Clinic on the campus. By then, the Free Clinic was operating a small outreach clinic serving homeless persons in cooperation with Catholic Charities Warming Center on 3rd Avenue. The idea of co-locating the permanent free clinic facility with the Warming Center, the Neighbor's Place, the Community Action Program, Blessings in a Backpack, Mobile Meals and numerous other critical local safety net organizations on the ***Community Partners Campus*** was too good to pass up.

Why a Free Clinic?

People living in poverty account for the vast majority of the uninsured (>70%). Research has clearly demonstrated the poor and uninsured have more limited access to healthcare while, paradoxically, being many times more likely to have health conditions that require ongoing medical attention, such as asthma, diabetes, cardiovascular disease, GI disorders, UTIs, obesity and musculoskeletal conditions. Health disparities based on race, ethnicity and geography also are well documented. The most common barrier to health care access is lack of insurance, but there are numerous other factors including: unemployment, no

company benefits, expense/cost sharing, lack of transportation, language &/or cultural issues, and immigration status, to name a few. While 3.2 million Americans lost their health insurance during 2017, and millions more in 2018 and 2019, the Coronavirus pandemic of 2020 and the resulting massive unemployment, have produced unprecedented numbers of uninsured. The Marathon County LIFE report found nearly 15% of county adults reported being uninsured at some point during the past year. And this was before COVID-19. No doubt, those numbers/rates are substantially higher now. Finally, people living in poverty and who are without health insurance tend to forego needed medical care until health emergencies arise, often times requiring ED services and hospital admission, even though their conditions were clearly amendable to outpatient, ambulatory management. Providing ambulatory, primary care services to low income, uninsured people is not only the compassionate and charitable thing to do, it is economically wise, both for the individual and society in general.

According to the Wisconsin Association of Free and Charitable Clinics, at present there are 85 Free and Charitable Clinics operating in Wisconsin. Although many of these clinics are in urban areas, many others operate in and serve rural populations, such as Ashland, Boscobel, Beaver Dam, Rice Lake, Marshfield, Merrill, Richland Center, Sparta, Waupun and Elkhorn. Wausau/ Marathon County is the last population center of our size without a Free Clinic in the state. Even though the FPC Free Clinic permanent site will be located in Wausau, we plan to engage in outreach activities and to serve any resident of Marathon County who is living at or near poverty and is uninsured. Research has shown urban areas tend to have higher poverty rates than rural communities, while rural areas tend to have older populations and higher uninsured rates. Both urban and rural communities in Marathon County will be served by the FPC Free Clinic.



Collaboration is Already Being Achieved

The collaboration of the nonprofits that Community Partners Campus (CPC) was hoping to achieve from inception is already happening. Over 18 months ago when CPC held its first few nonprofit partner meetings the partners have already fostered that collaboration concept. St. Vincent de Paul (SVdP) took on the responsibility of collection, repair/refurbish and redistribution of furniture that The Neighbors Place (TNP) was doing. No clients will see any diminished service as a result. SVdP had the capacity and TNP did not have the volume to make it effective. It was a win-win for all.

Further, the Salvation Army (SA) and TNP had been working on eliminating the food pantry at SA. No clients will lose any services and it is more efficient for SA and again TNP has the capacity.

We have witnessed wonderful collaborative conversations between SA and Catholic Charities on who and how the homeless shelters will serve. We believe those will end up with eliminating a duplication and each organization being able to focus on the demographics that they serve. No one will be left behind and again more coordinated efforts resulting in increased efficiency.

I trust the examples given make it clear that the members of the Community Partners Campus serve all the people of Marathon County and that it may help demonstrate the importance that we bring all of the organizations together to further promote collaboration amongst them.

2021 Marathon Co Estimated Tax Levy	8/15/2018	11/14/2019	8/1/2020
	2019	2020	2021
Net New Construction (NNC)	1.592%	2.161%	1.980%
Plus Terminated TID	0.000%	0.000%	0.000%
Net New Construction (NNC) and Terminated TID	1.592%	2.161%	1.980%
Equalized Value for Apportionment	3.87%	4.40%	6.56%
Terminated TID	0.00%	0.00%	0.00%

	Adopted 2019	Adopted 2020	ESTIMATED 2021
General Fund	32,004,617	32,752,227	33,400,721
Social Improvement	7,635,689	7,904,594	8,061,105
Capital Improvement	-	-	-
Highway	7,917,436	7,928,645	8,085,632
TOTAL OPERATING LEVY	47,557,742	48,585,466	49,547,458

Less: Special charges/personal property adjustment-2019
Less: Bridge Aid*
Less Adjustment 2016 unused levy

OPERATING LEVY	47,557,742	48,585,466	49,547,458
DEBT SERVICE	1,786,500	1,709,431	1,791,910
TOTAL LEVY BEFORE BRIDGE AID	49,344,242	50,294,897	51,339,368

	2020 Increase in Operating Levy	2021 Increase in Operating Levy	
	1,027,724 2.161%	961,992 1.980%	
2020 Debt Levy	(77,069)	2021 Debt Levy	82,479
	-4%		5%
2020 in total levy	1,121,010	2021 in total levy	928,517
	2.2651%		1.8346%

Add: Bridge Aid-Estimate 2018
Add: Adjustment to Op levy

TOTAL LEVY	49,489,841	50,610,851	51,539,368
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EQUALIZED VALUE	10,300,308,900	10,753,132,800	11,458,840,600
Operating levy rate	0.00462	0.00452	0.00432
Debt	0.00017	0.00016	0.00016
Special	0.00001	0.00003	0.00002
total levy rate	0.00480	0.00471	0.00450

Line 27-Tax Levy Rate	\$ 4.80	\$ 4.71	\$ 4.50	2020 Decrease in Tax Rate	2021 Increase in Tax Rate
				\$ (0.10)	\$ (0.21)

Outstanding Real Estate Property Taxes

2019 Tax Year

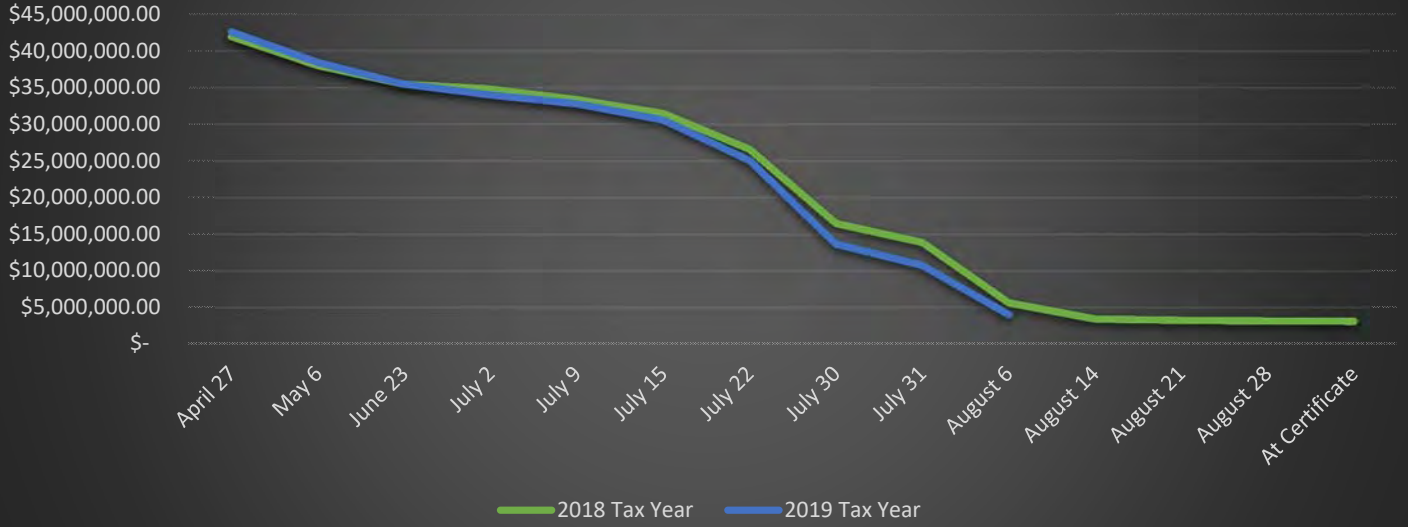
Date	April 27	May 6	June 23	July 2	July 9	July 15	July 22
RE Postponed Amount P	\$ 39,075,897.56	\$ 35,090,553.42	\$ 32,194,470.05	\$ 31,208,476.34	\$ 30,090,281.21	\$ 27,917,828.06	\$ 22,431,768.49
RE Postponed Count P	20189	19963	18690	18202	17389	16037	13056
RE Postponed Percentage* P	24.67%	24.40%	22.84%	22.24%	21.25%	19.60%	15.95%
RE Delinquent Amount D	\$ 3,534,880.76	\$ 3,359,855.01	\$ 3,302,458.94	\$ 2,804,306.67	\$ 2,719,838.42	\$ 2,682,922.29	\$ 2,628,201.12
RE Delinquent Count D	1848	1814	1746	1663	1647	1635	1602
RE Delinquent Percentage* D	2.26%	2.22%	2.13%	2.03%	2.01%	2.00%	1.96%
Total Amount	\$ 42,610,778.32	\$ 38,450,408.43	\$ 35,496,928.99	\$ 34,012,783.01	\$ 32,810,119.63	\$ 30,600,750.35	\$ 25,059,969.61
Total Count	22037	21777	20436	19865	19036	17672	14658
Total Number of Parcels*	26.93%	26.61%	24.97%	24.28%	23.26%	21.60%	17.91%
Prior Year Outstanding Total	\$ 41,961,159.68	\$ 37,999,389.48	\$ 35,469,930.39	\$ 34,811,568.68	\$ 33,363,731.39	\$ 31,501,170.88	\$ 26,596,290.18
Prior Year % Outstanding	17.32%	15.68%	14.64%	14.37%	13.77%	13.00%	10.98%
Current Year % Outstanding	16.89%	15.24%	14.07%	13.48%	13.01%	12.13%	9.93%
Difference (current - prior)	\$ 649,618.64	\$ 451,018.95	\$ 26,998.60	\$ (798,785.67)	\$ (553,611.76)	\$ (900,420.53)	\$ (1,536,320.57)

*All percentages are percent of total number real estate parcels within Marathon County, including City of Wausau

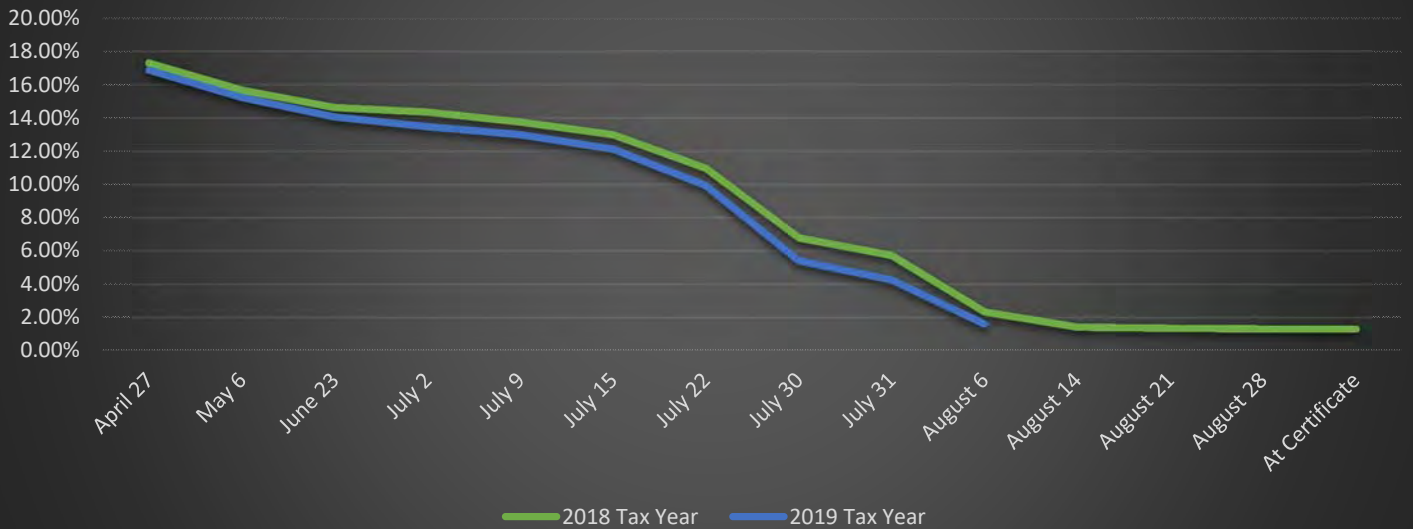
Date	July 30	July 31	August 6				
RE Postponed Amount P	\$ 11,109,366.88	\$ 8,220,772.38	\$ 1,649,287.35				
RE Postponed Count P	6824	5497	1309				
RE Postponed Percentage* P	8.34%	6.72%	1.60%				
RE Delinquent Amount D	\$ 2,552,133.48	\$ 2,527,627.11	\$ 2,404,977.55				
RE Delinquent Count D	1568	1555	1515				
RE Delinquent Percentage* D	1.92%	1.90%	1.85%				
Total Amount	\$ 13,661,500.36	\$ 10,748,399.49	\$ 4,054,264.90				
Total Count	8392	7052	2824				
Total Number of Parcels*	10.26%	8.62%	3.45%				
Prior Year Outstanding Total	\$ 16,478,819.85	\$ 13,887,402.84	\$ 5,669,325.93				
Prior Year % Outstanding	6.80%	5.73%	2.34%				
Current Year % Outstanding	5.42%	4.26%	1.61%				
Difference (current - prior)	\$ (2,817,319.49)	\$ (3,139,003.35)	\$ (1,615,061.03)				

*All percentages are percent of total number real estate parcels within Marathon County, including City of Wausau

Total Amount Remaining Outstanding



Percentage of Total Levies Outstanding



1. Select County

Marathon

January through July Sales Tax Distributions								
	January	February	March	April	May	June	July	Total
2019	\$1,142,431	\$1,256,386	\$908,399	\$749,484	\$1,142,063	\$967,132	\$1,222,717	\$7,388,612
2020	\$1,457,354	\$1,130,210	\$943,901	\$1,043,521	\$939,203	\$934,176	\$1,288,655	\$7,737,020
	27.6%	-10.0%	3.9%	39.2%	-17.8%	-3.4%	5.4%	4.7%
\$ Difference	\$348,408							
% Difference	4.7%							

2. Select change in remaining months in 2020 compared to 2019

0%

Total 2019	\$13,164,932
Total 2020	\$13,513,340
\$ Difference	\$348,408
% Difference	2.6%

Input budgeted 2020 sales tax amount

Budgeted 2020	\$13,479,000
Total 2020	\$13,513,340
\$ Difference	\$34,340
% Difference	0.3%

1. Select County

Marathon

January through July Sales Tax Distributions								
	January	February	March	April	May	June	July	Total
2019	\$1,142,431	\$1,256,386	\$908,399	\$749,484	\$1,142,063	\$967,132	\$1,222,717	\$7,388,612
2020	\$1,457,354	\$1,130,210	\$943,901	\$1,043,521	\$939,203	\$934,176	\$1,288,655	\$7,737,020
	27.6%	-10.0%	3.9%	39.2%	-17.8%	-3.4%	5.4%	4.7%
\$ Difference	\$348,408							
% Difference	4.7%							

2. Select change in remaining months in 2020 compared to 2019

-5%

Total 2019	\$13,164,932
Total 2020	\$13,224,524
\$ Difference	\$59,592
% Difference	0.5%

Input budgeted 2020 sales tax amount

Budgeted 2020	\$13,479,000
Total 2020	\$13,224,524
\$ Difference	-\$254,476
% Difference	-1.9%



MARATHON COUNTY MEMORANDUM

TO: Human Resources/Finance and Property Committee
 FROM: Marathon County Finance Department
 DATE: July 17, 2020
 RE: **SALES TAX**

The following is a schedule of the sales tax for Marathon County
 Audit Year Recorded by County

Annual Budget Amount	\$ 13,479,000	\$ 13,000,000	\$ 11,900,000	\$ 11,550,000	Dollar Amount change increase/(decrease)			
					2020-2019	2019-2018	2018-2017	2017-2016
Month Received By the County	2020 Amount	2019 Amount	2018 Amount	2017 Amount				
January	\$ 1,457,354	\$ 1,142,431.09	\$ 800,452.34	\$ 835,021.56	\$ 314,922.92	\$ 341,978.75	\$ (34,569.22)	\$ (236,746.70)
February	1,130,210	1,256,386.48	1,260,468.63	1,081,664.27	\$ (126,176.56)	\$ (4,082.15)	\$ 178,804.36	193,870.22
March	943,901	908,398.75	838,351.81	948,519.00	\$ 35,502.66	\$ 70,046.94	\$ (110,167.19)	97,313.38
April*	1,043,521	749,483.89	715,833.19	791,673.18	\$ 294,037.46	\$ 33,650.70	\$ (75,839.99)	(149,463.44)
May	939,203	1,142,062.73	1,158,593.07	992,137.81	\$ (202,859.52)	\$ (16,530.34)	\$ 166,455.26	181,585.11
June	934,176	967,132.29	1,125,150.76	1,067,313.37	\$ (32,956.74)	\$ (158,018.47)	\$ 57,837.39	(53,215.96)
July	-	1,222,717.04	1,000,229.05	970,452.53		\$ 222,487.99	\$ 29,776.52	(77,272.05)
August	-	1,338,918.99	1,382,561.53	1,137,407.08		\$ (43,642.54)	\$ 245,154.45	127,845.64
September	-	922,822	925,330	1,099,652.84		\$ (2,508.10)	\$ (174,322.80)	45,508.37
October	-	1,303,819	1,144,810	1,003,673.24		\$ 159,009.27	\$ 141,136.56	(61,934.20)
November	-	1,267,223	1,297,956	1,157,596.57		\$ (30,733.11)	\$ 140,359.76	154,552.10
December	-	943,536.53	972,839.64	1,072,655.43		\$ (29,303.11)	\$ (99,815.79)	(86,943.79)
Year to Date	6,448,365.45	13,164,932.02	12,622,576.19	12,157,766.88	282,470.22	542,355.83	464,809.31	135,098.68
Annual % incr(decr)	4.6%	4.3%	3.8%	1.1%				

*April 2016 had an adjustment of (244,043.96)

New & Expanded Position Requests - 2021

Dept	Request	Class Title (Working Title)	Occ Code DBM	Funding	Net Change FTE	Additional County Funding			Non-Levy or Grant Funds			CTY ADMIN APPROVAL TO PROCEED	Supported by HR, F&P Committee	
						Minimum	Control Point	Maximum	Minimum	Control Point	Maximum			
Positions Requested To Include In 2021 Budget														
1	Sheriff's Office	Create	Lieutenant - Investigation Division	1014 Contract	100% Tax Levy	1.00	\$124,374	\$125,301	\$126,228				NO	
2	Sheriff's Office	Create	Communications Specialist (Public Safety 911 Dispatcher)	5071 B23	100% Tax Levy	2.00	\$140,984	\$156,960	\$176,630				NO	
3	Emergency Management	Upgrade	Emergency Management Technician Upgrade Admin Specialist (B21) to EM Technician (B23)	B23	50% Tax Levy 50% EPCRA Grant	0.00	\$4,890	\$5,573	\$6,414	\$4,890	\$5,573	\$6,414	YES	
4	District Attorney's Office	Create	Administrative Coordinator (Legal Secretary)	5023 B23	100% Tax Levy	1.00	\$70,492	\$78,480	\$88,315				NO	
5	District Attorney's Office	Create	Assistant Corporation Counsel (Assistant District Attorney)	5194 C42-Market	100% Tax Levy	1.00	\$87,020	\$99,455	\$141,398				NO	
6	Parks, Recreation & Forest	Expand .60 FTE to 1.0 FTE	Motorized Recreation Coordinator	5240 B23	56% Tax Levy 44% State Grants	0.40	\$24,005	\$25,824	\$28,693	\$18,861	\$20,291	\$22,544	NO	
REQUESTED FTE'S & FUNDING FOR CONSIDERATION IN 2020 BUDGET						5.40	\$427,760	\$491,593	\$567,678	\$23,751	\$25,864	\$28,958		

MARATHON COUNTY
Budget Transfer Authorization Request Form

This form must be completed electronically and emailed to **Alicia Richmond** and to your Department Head. This email will confirm that your Department Head acknowledges approval of this transfer. Forms that are incomplete, incorrect, out-of-balance, or that have not been sent to your Department Head will be returned. The Finance Department will forward completed forms to the Marathon County Human Resources, Finance & Property Committee.

DEPARTMENT: Sheriff

BUDGET YEAR: 2020

TRANSER FROM:

Action	Account Number	Account Description	Amount
Revenue Increase	148 238 89900	Federal Forfeiture account-Sheriff	102,585.06
Expenditure Decrease	216 91193490	Corrections Other Operating Supplies	8,492
Expenditure Decrease	218 90993250	Corrections Registration	2,591
Expenditure Decrease	218 90993340	Corrections Commercial Travel	2,000
Expenditure Decrease	218 90993350	Corrections Meals	1,500
Expenditure Decrease	218 909 93360	Corrections Lodging	2,500
Expenditure Decrease	218 90993490	Corrections Oth Operating Supplies	1,000
Expenditure Decrease	228 97493490		8,762

TRANSER TO:

Action	Account Number	Account Description	Amount
Select action		Click here to enter account description	Enter amount

I, the undersigned, respectfully request that the Human Resources, Finance & Property Committee approve the following change in budget / transfer of funds as discussed in the attached supplemental information.

Requested By: Enter the name of the person that completed this form

Date Completed: Select Date

COMPLETED BY FINANCE DEPARTMENT:

Approved by Human Resources, Finance & Property Committee: _____

Date Transferred: _____

MARATHON COUNTY
Budget Transfer Authorization Request – Supplemental Information

Attach this supplemental information to the original Budget Transfer Authorization Request Form. All questions must be completed by the requesting department, or the Budget Transfer Authorization Request Form will be returned.

- 1) What is the name of this Program/Grant? (DO NOT use abbreviations or acronyms)
Federal Forfeiture account

- 2) Provide a brief (2-3 sentence) description of what this program does.
Federal Forfeitures can be used by the jurisdiction for programming and the County is moving current funds back the Federal Forfeitures account for use by the Marathon County Sheriff's department

- 3) This program is: (Check one)
 An Existing Program.
 A New Program.

- 4) What is the reason for this budget transfer?
 Carry-over of Fund Balance.
 Increase/Decrease in Grant Funding for Existing Program.
 Increase/Decrease in Non-Grant Funding (such as tax levy, donations, or fees) for Existing Program.
 Set up Initial Budget for New Grant Program.
 Set up Initial Budget for New Non-Grant Program
 Other. Please explain: [Click here to enter description](#)

- 5) If this Program is a Grant, is there a "Local Match" Requirement?
 This Program is not a Grant.
 This Program is a Grant, but there is no Local Match requirement.
 This Program is a Grant, and there is a Local Match requirement of: (Check one)
 Cash (such as tax levy, user fees, donations, etc.)
 Non-cash/In-Kind Services: (Describe) [Click here to enter description](#)

- 6) Does this Transfer Request increase any General Ledger 8000 Account Codes? (Capital Outlay Accounts)
 No.
 Yes, the Amount is Less than \$30,000.
 Yes, the Amount is \$30,000 or more AND: (Check one)
 The capital request HAS been approved by the CIP Committee.
 The capital request HAS NOT been approved by the CIP Committee.

COMPLETED BY FINANCE DEPARTMENT:

Is 10% of this program appropriation unit or fund? No Is a Budget Transfer Resolution Required? No

MARATHON COUNTY
Budget Transfer Authorization Request Form

This form must be completed electronically and emailed to **Alicia Richmond** and to your Department Head. This email will confirm that your Department Head acknowledges approval of this transfer. Forms that are incomplete, incorrect, out-of-balance, or that have not been sent to your Department Head will be returned. The Finance Department will forward completed forms to the Marathon County Human Resources, Finance & Property Committee.

DEPARTMENT: Sheriff

BUDGET YEAR: 2020

TRANSER FROM:

Action	Account Number	Account Description	Amount
Expenditure Decrease	228 97493480	Corrections Educational Supplies	740.06
Expenditure Decrease	146 24098252	Corrections Jail Kitchen	75,000

TRANSER TO:

Action	Account Number	Account Description	Amount
Select action		Click here to enter account description	Enter amount

I, the undersigned, respectfully request that the Human Resources, Finance & Property Committee approve the following change in budget / transfer of funds as discussed in the attached supplemental information.

Requested By: Sheriff Parks

Date Completed: 8/7/2020

COMPLETED BY FINANCE DEPARTMENT:

Approved by Human Resources, Finance & Property Committee: _____

Date Transferred: _____

MARATHON COUNTY
Budget Transfer Authorization Request – Supplemental Information

Attach this supplemental information to the original Budget Transfer Authorization Request Form. All questions must be completed by the requesting department, or the Budget Transfer Authorization Request Form will be returned.

- 1) What is the name of this Program/Grant? (DO NOT use abbreviations or acronyms)
Federal Forfeiture account

- 2) Provide a brief (2-3 sentence) description of what this program does.
Federal Forfeitures can be used by the jurisdiction for programming and the County is moving current funds back the Federal Forfeitures account for use by the Marathon County Sheriff's department

- 3) This program is: (Check one)
 An Existing Program.
 A New Program.

- 4) What is the reason for this budget transfer?
 Carry-over of Fund Balance.
 Increase/Decrease in Grant Funding for Existing Program.
 Increase/Decrease in Non-Grant Funding (such as tax levy, donations, or fees) for Existing Program.
 Set up Initial Budget for New Grant Program.
 Set up Initial Budget for New Non-Grant Program
 Other. Please explain: [Click here to enter description](#)

- 5) If this Program is a Grant, is there a "Local Match" Requirement?
 This Program is not a Grant.
 This Program is a Grant, but there is no Local Match requirement.
 This Program is a Grant, and there is a Local Match requirement of: (Check one)
 Cash (such as tax levy, user fees, donations, etc.)
 Non-cash/In-Kind Services: (Describe) [Click here to enter description](#)

- 6) Does this Transfer Request increase any General Ledger 8000 Account Codes? (Capital Outlay Accounts)
 No.
 Yes, the Amount is Less than \$30,000.
 Yes, the Amount is \$30,000 or more AND: (Check one)
 The capital request HAS been approved by the CIP Committee.
 The capital request HAS NOT been approved by the CIP Committee.

COMPLETED BY FINANCE DEPARTMENT:

Is 10% of this program appropriation unit or fund? No Is a Budget Transfer Resolution Required? No

MARATHON COUNTY
Budget Transfer Authorization Request Form

This form must be completed electronically and emailed to **Alicia Richmond** and to your Department Head. This email will confirm that your Department Head acknowledges approval of this transfer. Forms that are incomplete, incorrect, out-of-balance, or that have not been sent to your Department Head will be returned. The Finance Department will forward completed forms to the Marathon County Human Resources, Finance & Property Committee.

DEPARTMENT: Social Services

BUDGET YEAR: 2020

TRANSER FROM:

Action	Account Number	Account Description	Amount
Expenditure Decrease	176 497 9 2550	Telephone	\$4769
Expenditure Decrease	176 517 9 2550	Telephone	\$7418
Expenditure Decrease	176 501 9 2550	Telephone	\$4769
Expenditure Decrease	176 472 9 2550	Telephone	\$7418
Expenditure Decrease	176 461 9 2550	Telephone	\$530
Expenditure Decrease	176 455 9 2550	Telephone	\$3709

TRANSER TO:

Action	Account Number	Account Description	Amount
Expenditure Increase	176 456 9 2550	Telephone	\$28,612

I, the undersigned, respectfully request that the Human Resources, Finance & Property Committee approve the following change in budget / transfer of funds as discussed in the attached supplemental information.

Requested By: Stacy Spencer

Date Completed: 8/5/2020

COMPLETED BY FINANCE DEPARTMENT:

Approved by Human Resources, Finance & Property Committee: _____

Date Transferred: _____

MARATHON COUNTY
Budget Transfer Authorization Request – Supplemental Information

Attach this supplemental information to the original Budget Transfer Authorization Request Form. All questions must be completed by the requesting department, or the Budget Transfer Authorization Request Form will be returned.

- 1) What is the name of this Program/Grant? (DO NOT use abbreviations or acronyms)
Telephone- cell phone usage

- 2) Provide a brief (2-3 sentence) description of what this program does.

Cell Phones and billing for social work staff

- 3) This program is: (Check one)
 - An Existing Program.
 - A New Program.

- 4) What is the reason for this budget transfer?
 - Carry-over of Fund Balance.
 - Increase/Decrease in Grant Funding for Existing Program.
 - Increase/Decrease in Non-Grant Funding (such as tax levy, donations, or fees) for Existing Program.
 - Set up Initial Budget for New Grant Program.
 - Set up Initial Budget for New Non-Grant Program
 - Other. Please explain: [Click here to enter description](#)

- 5) If this Program is a Grant, is there a “Local Match” Requirement?
 - This Program is not a Grant.
 - This Program is a Grant, but there is no Local Match requirement.
 - This Program is a Grant, and there is a Local Match requirement of: (Check one)
 - Cash (such as tax levy, user fees, donations, etc.)
 - Non-cash/In-Kind Services: (Describe) [Click here to enter description](#)

- 6) Does this Transfer Request increase any General Ledger 8000 Account Codes? (Capital Outlay Accounts)
 - No.
 - Yes, the Amount is Less than \$30,000.
 - Yes, the Amount is \$30,000 or more AND: (Check one)
 - The capital request HAS been approved by the CIP Committee.
 - The capital request HAS NOT been approved by the CIP Committee.

COMPLETED BY FINANCE DEPARTMENT:

Is 10% of this program appropriation unit or fund? No Is a Budget Transfer Resolution Required? No

RESOLUTION #R-___-20

TO CREATE ONE (1) FULL-TIME ADMINISTRATIVE POSITION SUPPORTING BOTH CONSERVATION PLANNING & ZONING DEPT .80FTE AND HEALTH DEPT .20 FTE

WHEREAS, the creation of this position is compatible with the County’s mission statement as it will allow Conservation Planning and Zoning (CPZ) and the Marathon County Health Department (MCHD) to continue and expand their customer service capabilities to ensure timely responses to our customer needs while providing programs that help make Marathon County a preferred place to live, work, visit, and do business. In addition, this shared position request will serve as a “pilot” initiative and provide a model for other county departments to address customer needs; and

WHEREAS, the creation this position would directly assist both CPZ and MCHD as they continue to grow programs related to resource protection and disease prevention by providing additional administrative support to serve customers involved with these programs. CPZ and MCHD are jointly involved with respect to Marathon County Strategic Plan Objectives 6.3 (Protect and enhance the quantity and quality of potable groundwater and potable surface water supplies) and 12.3 (Promote cost-effective public services). CPZ and MSHD are also named individually as Departments contributing to the achievement of Objectives 3.3, 3.7, 5.2, 7.2, 10.8, 10.10, and 10.12; and

WHEREAS, this position will not require additional tax levy, and may reduce tax levy for staff, as it will be funded by:

- 1) converting a current CPZ Casual Administrative Assistant position (28 hours per week),
- 2) absorbing the MCHD (vacant).4 FTE allocated position (16 hours per week), and
- 3) abolishing a CPZ LTE Conservation Technician position

in order to create one full time (1 FTE) Administrative Assistant position (.8 FTE –CPZ; .2 FTE – MCHD).

WHEREAS, on June 30, 2020, the Environmental Resources Committee voted to recommend the creation of one full-time FTE Administrative Assistant to the Human Resources, Finance and Property Committee; and

WHEREAS, August 11, the Human Resources, Finance and Property Committee also voted to recommend the creation of one (1) fulltime Administrative Assistant, Pay Grade A12 to County Board.

NOW, THEREFORE, BE IT ORDAINED AND RESOLVED by the Board of Supervisors of the County of Marathon:

- A. To create one (1) full-time Administrative Assistant position providing .80 FTE to CPZ and .20 FTE to MCHD, Pay Grade A12, as soon as selection/recruitment can be completed.

Respectfully submitted this ___th day of August, 2020.

HUMAN RESOURCES, FINANCE AND PROPERTY COMMITTEE

_____	_____
_____	_____
_____	_____

Fiscal Impact: No increase to tax levy. Funding will come from the Public Health Preparedness Grant, CPZ Conservation Grant funds and fees. Funds are already included in the budgets of the respective departments. No budget amendment is necessary.

**MARATHON COUNTY HEALTH DEPARTMENT AND MARATHON COUNTY
CONSERVATION, PLANNING, AND ZONING DEPARTMENT**

CONSOLIDATED SHARED POSITION PROPOSAL

June 8, 2020

In order to become more efficient and cost effective, while maintaining exceptional customer service, the Marathon County Health Department (MCHD) and Conservation, Planning and Zoning (CPZ) Department have explored the possibility of sharing an administrative support position. This proposal provides the opportunity to pilot a shared position between the two departments and potentially serve as a model for other county departments to join together to address county-wide staffing needs.

Key objective:

- Pilot a shared Administrative Support position between CPZ and MCHD to determine if efficiencies can be gained and sustained by combining two part-time positions into one full time position.

Proposal:

CPZ and MCHD propose to convert the current CPZ casual Administrative Assistant position (28 hours per week); the MCHD .4 FTE allocated position (16 hours per week) to one full time (1 FTE) Administrative Assistant position (.8 FTE –CPZ; .2 FTE – MCHD). The proposal includes the abolishment of a CPZ Casual Conservation Technician position in order to provide a portion of the non-tax levy funding for the new position. The purpose of this position is to continue to provide enhanced customer service to our citizens and administrative support for the CPZ and MCHD professional staff.

<u>Current</u>	<u>Future</u>	<u>Difference</u>
Health – 832 hours allocated	Health - 416 per year = 8 hours per week	Health - 8 hours per week instead of 16 hours per week
CPZ – 3,000 hours, casual (2 positions, 1500 hours cap)	CPZ - 1664 hours per year = 32 hours per week	CPZ -32 hours per week instead of an average 28 or fewer hours
Total – 3832 hours	Total - 2,080 hours, 1.0 FTE	Reduction: 1752 hours

Note: Hours allocated between departments may be adjusted as required by workload/season. Grant funded Casual CPZ Technician workload would be shifted to existing staff and new administrative support position.

Background:

- Currently MCHD has a .4 part-time permanent Administrative Assistant who retired at the end of May, 2020. CPZ has a 1500 hour per year casual Administrative Assistant and a 1500 hour per year casual CPZ Conservation Technician. The casual CPZ Conservation Technician position is currently vacant.

- There has been an increase in the administrative assistant type workload within CPZ due to private onsite wastewater treatment system (POWTS) program expansion. This workload includes: additional phone calls, permit processing, scanning, online form development, etc. (2020 POWTS permit applications submitted to CPZ through May 31st, 2020 = 130 compared to 82 at this time last year; 2020, CPZ has averaged 358 incoming phone calls per week to the 2 main department numbers. This position is responsible for answering 60% of these calls and screens inquiries, answers questions, and if needed, forwards to professional staff.
- There is an opportunity to shift the conservation workload of the Casual CPZ Conservation Technician to existing staff as well as shifting administrative type duties of this position to administrative support staff.
- Although the MCHD need for reception desk coverage has not changed, the increased use of technology and integration of self-service options has caused reduced occupancy within that position.

Efficiency and Productivity Benefits:

- Allowing an individual to complete necessary CPZ work while covering the MCHD reception desk will increase occupancy and efficiency, allowing 1 fulltime individual to complete more meaningful work than 3 part time people in the same number of hours.
- Improves continuation of operations for both CPZ and MCHD by allowing access to staff fulltime during normal business hours as opposed to gaps in part time service. It avoids employee reorientation after having been out of the office.
- Position can respond to both MCHD and CPZ phone calls regardless of where the person is sitting.
- Having this position available to provide customer support allows the higher paid technical and professional staff to focus on higher skill/priority work, saving money and reducing customer wait times.
- Reduces the need for other administrative support staff to work over 40 hours per week to complete tasks in a timely manner when part-time individual is not scheduled to work. This causes a potential “liability” to Marathon County as it relates to payment of overtime and /or accumulation of comp time.
- Combining seasonal and part time positions that currently have similar duties into 1 FTE will save management time (onboarding, training, appraisals, rounding, etc.)
- Casual and part-time staff typically have higher turnover, which equals loss of highly qualified, knowledgeable staff.

Additional Benefits

- Current arrangement continues to have departments operate in “silos”. This would be a new opportunity to “pilot” a new interdepartmental working arrangement, increasing our commitment to Core Values (specifically Shared Purpose and Stewardship of Resources).
- One shared position increases the shared knowledge base of interrelated programs/projects in each department that:
 - ✓ May identify areas of collaboration or further shared resources (i.e. POWTS and well testing program, etc.).

- ✓ Provides staffing for anticipated future administrative work related to groundwater and Strategic Plan Objective 6.3, Protect and enhance the quantity and quality of potable groundwater and potable surface water supplies.
- ✓ Provides an opportunity for interdepartmental idea/best practice sharing
- Reflects the seasonal nature of each department’s needs and workload.
 - ✓ CPZ needs more administrative support from April through November.
 - ✓ MCHD needs more administrative support from September through May.
- Serves as an example for future collaborative positions between other County departments.
- Position provides administrative support for programs that have been identified as Quartile 2 in Priority Based Budgeting.
- Helps Marathon County be a preferred employer by offering a desirable fulltime position to a dedicated casual employee with the core values and work ethic that Marathon County strives to maintain.

STAFFING COSTS AND FINANCIAL IMPACT

2020 Budget Amounts

Health .4 FTE, 832 hours/year	41%	Health tax levy	\$6,556
	59%	PHP (Health grant funds)	\$9,437
CPZ Casual, 1,500 hours/year	50%	Tax Levy	\$11,250
	50%	POWTS/Zoning permit fees	\$11,250
CPZ Casual Conservation Technician, 1500 hours /year	100%	Conservation Grants and fees	\$22,505
TOTAL			\$60,998

In 2019, CPZ submitted a 2020 CPZ Expanded Position request to convert the casual Administrative Assistant to a full time position at an estimated cost of \$56,000 (salary and fringes). The requested expanded position was initially approved by Administration and later was removed during the 2020 budget process.

The anticipated cost for a FTE Administrative Assistant with family health insurance coverage for 2021 is \$58,610. The anticipated cost for a FTE Administrative Assistant at \$15/ hour with no health or dental insurance is \$36,294. Since CPZ and MCHD anticipate that this position would be filled by the current CPZ casual Administrative Assistant, the anticipated cost would be \$36,294.

2021 Budget Amounts

Health (416 hours/year)	Health grant funds	\$7,259
CPZ (1664 hours/year)	Conservation grant funds	\$8,711
	Permit Revenue	\$20,324
Total		\$36,294

Note:

With any new “pilot” program, it is imperative that evaluation as to effectiveness is completed. MCHD and CPZ Management have discussed possible metrics to utilize for evaluation. These metrics may include: financial savings, efficiencies created, customer satisfaction, online/self-service advancements, etc. With the assistance of the Organizational Excellence Program Manager, these metrics would be clearly identified and measured should CPZ and MCHD receive approval to proceed with this proposal.

APPENDIX B
NEW OR EXPANDED POSITION REQUEST

I. GENERAL INFORMATION

Department: *Conservation, Planning and Zoning (CPZ) and Health Department (MCHD)* Date: *May 29, 2020*

Position Requested: *Administrative Assistant (Conversion of existing 2 CPZ casual positions and 1 Health Department allocated .4 FTE to fulltime)*

FT PT FTE 100%

Number of Positions: *1*

Division Position Will Be Assigned To: *N/A*

Projected Start Date of Position: *1-1-2021 (OR August, 2020 if approved)* Priority Number of This Position: *1*

II. FULL EXPLANATION OF NEED FOR POSITION

A. Is this position request compatible with the County's mission statement?

This position is compatible with the County's mission statement as it will allow CPZ and MCHD to continue and expand its customer service capabilities to ensure timely responses to our customer needs while providing programs that help make Marathon County a preferred place to live, work, visit, and do business. In addition, this shared position request will serve as a "pilot" initiative to serve as a model for other county departments to address customer needs.

B. What is your department's mission statement and how does position support this mission and/or department strategic plan?

CPZ's mission is to: Protect our community's land and environment, because we believe that the economic strength and vitality of our community is dependent on the quality of our resources. Through leadership, accountability, community engagement and collaborative partnerships, we promote thoughtful and deliberate use of resources and innovative solutions so that Marathon County has healthy people, a healthy economy and a healthy environment today and tomorrow.

MCHD's mission is to advance a healthy Marathon County community by preventing disease, promoting health and protecting the public from environmental hazards.

This position request will support both CPZ and MCHD as the departments continue to grow resource protection and disease prevention programs by providing additional administrative support to serve customers involved with these programs. CPZ and MCHD are heavily involved with numerous Strategic Plan Objectives (Objectives 3.3, 3.7, 5.2, 6.3, 7.2, 10.8, 10.10, 10.12 and 12.3) and are the lead departments for Objectives 3.7, 5.2, 6.3 and 7.2. The professional staff implementing programs that address these objectives need administrative support to ensure enhanced service and success with obtaining outcomes.

C. Indicate reasons for asking for position including purpose of position, applicable workload data and trends, etc. **plus attach relevant supporting data.** If more than one position of the same classification is being requested, also justify the number requested.

This request is to convert the current CPZ casual Administrative Assistant position (28 hours per week); the MCHD .4 FTE allocated position (16 hours per week) to one full time (1 FTE) Administrative Assistant position (.8 FTE –CPZ; .2 FTE – MCHD). This conversion will also include abolishing the CPZ LTE Conservation Technician position to provide a portion of the funding for the new position. The purpose of this position is to continue to provide enhanced customer service to our citizens and administrative support for the CPZ and MCHD professional staff.

Additional document will be submitted that provides supporting data related to the workload data and trends for this position request.

- D. What benefit will the position provide to the County? How does the position improve/enhance customer service and/or address community needs?

Benefit of the position:

A shared consolidated fulltime Administrative Assistant position will provide efficiencies and productivity benefits for both departments. The benefits include:

Increase in occupancy and efficiency by allowing an individual to complete necessary CPZ work while covering the MCHD reception desk or vice versa. This allows 1 fulltime individual to complete more meaningful work than 3 part time people working the same number of hours.

Position can respond to both MCHD and CPZ calls regardless of where the person is sitting.

Improves continuation of operations for both CPZ and MCHD by allowing access to staff fulltime during normal business hours as opposed to gaps in part time service. It avoids reoccurring employee reorientation after having been out of the office.

Having this position available to provide customer support allows the higher paid technical and professional staff to focus on higher skill/priority work, saving money and reducing customer wait times. In addition, this request creates a dedicated staff person available to assist customers with wading through the complex and diverse programs and providing personal customer contact in order to better understand the customers' needs.

Provides for office coverage when Administrative Coordinators are attending the numerous committee and board meetings which CPZ support (Environmental Resource Committee, Board of Adjustment, Metropolitan Planning Organization, Solid Waste Management Board, etc.)

Reduces the need for other administrative support staff to work over 40 hours per week to complete tasks in a timely manner when part-time individual is not scheduled to work. This causes another financial burden to Marathon County as it relates to payment of overtime and /or lost work time due to accumulation and use of comp time.

Combining 3 casual and part time positions that currently have similar duties into 1 FTE will save management time (onboarding, training, appraisals, rounding, etc.) In addition, casual and part-time staff typically have higher turnover, which equals loss of highly qualified, trained staff.

Improve/Enhance customer service:

Although there has been a significant shift in society to serve customers through technology, in government there will always be a need for personal contacts to address unique personal situations. Both departments are striving to provide increased customer service through technology, but due to the nature and complexity of CPZ programs and ordinances, individuals will continue to seek assistance through conversations about their unique circumstances of their land, structures, and management practices. This position would be the first point of contact for those customers.

Due to the state mandated requirements of county inspections, particularly for installation of private onsite wastewater treatment systems within 24 hours of notification from the plumber, scheduling those inspections can be difficult and cannot be accommodated by online scheduling. Weather, equipment, and material delivery related challenges disrupt normal scheduling. This position would be responsible for answering the phone and assisting customers/plumbers with scheduling and rescheduling inspections.

In addition to the position benefit examples listed above, this position creates the ability for both departments to fully utilize technology to provide customer service and will create opportunities for customers to self-serve/24/7 using technology. Current examples of this includes online purchasing of Health Department test kits. CPZ will continue to pursue and develop more online permit applications through Laserfiche workflow process and this position would assist with those efforts.

The proposal also demonstrates the ability for Marathon County to fully utilize technology to serve customers no matter where the person is physically located. Ultimately, this shared consolidated position proposal will serve as “pilot” for future opportunities to enhance customer service throughout Marathon County government.

- E. Indicate any alternatives to creating this position that were considered and why you still chose to request the position?

Alternatives considered by both departments include refilling the .4 FTE position at MCHD as is and continue with the current 2 CPZ casual positions. This alternative would continue to have departments operate in “silos” and does not demonstrate the core values of shared purpose and stewardship of resources. This current situation continues the underutilization of staffing resources with the .4 FTE position.

Based upon the information above and after thorough review of the current programs, workload and in the spirit of shared purpose and stewardship of resources, MCHD and CPZ believes that sharing a consolidated fulltime position is the most efficient and effective method to address departmental needs. Providing enhanced customer service to customers (both internal and external) is of highest priority to MCHD and CPZ. CPZ’s complex and diverse programs need personal customer contact as some customers struggle to understand ordinance and program requirements through the website alone. Utilizing an Administrative Support staff person to provide preliminary guidance on the complex programs, allows the higher paid technical staff more time to focus on higher level program issues thus fully utilizing the skillset of staff to the best interest of Marathon County (financially and programmatically).

This proposal is a strong example of cross department cooperation and fully utilizing staffing resources to address long term needs of both departments.

- F. What will be the effect if the proposed position is not created?

CPZ’s and MCHD’s goal is to provide an enhanced level of service in all program areas. The effect of not expanding this administrative assistant position to a fulltime shared position will be the inability to maintain the current level of customer service as well as not providing the anticipated level of services needed as the workload increases with the expanded programs. This will impact the processing time for permit applications as well as permit revenue.

As stated previously, this position will convert forms, permits, and processes to be available online and more accessible to citizens. With the current administrative support workload, some of the basic administrative support tasks such as scanning of documents and conversion of forms becomes low priority and therefore not accomplished, leading to long-term inefficiencies.

As programs continue to grow and expand, CPZ and MCHD Management evaluate and make adjustments to higher level positions (professional, technical and administrative coordinator positions), therefore, ensuring that staff are working at the appropriate level for their positions and shifting administrative tasks to support staff. Without a fulltime Administrative Assistant this will not be accomplished.

In addition, as a “pilot” example of a shared consolidated position, not creating this position does not allow CPZ and MCHD to demonstrate cross departmental cooperation that could lead as an example for future shared positions.

- G. What criteria will you use to monitor the effectiveness and performance of the position? (Increasing revenues, improved customer service, decreasing costs, enhancing services, etc?)

With any new “pilot” program, it is imperative that program effectiveness is completed. MCHD and CPZ Management have discussed metrics that include: financial savings, efficiencies created, customer satisfaction, online/self-service advancements, etc. (see list below). These metrics would be clearly identified and measured should CPZ and MCHD receive approval to proceed with this proposal. “Pilot” program metrics that may be used to monitor the effectiveness and performance of this position

include:

- *Permit processing time improvements which leads to issuance of more permits which increase permit fee revenue*
- *Maximum customer understanding and acceptance of the reasons for their need to comply with the POWTS maintenance requirements through quality customer service.*
- *Efficiencies in technical staff time increased because standard program related questions are answered by support staff*
- *Zoning Program growth and timeliness of permit issuance.*
- *Forms, permits, processes are available online.*
- *Customer service surveys show high satisfaction with customer service and adherence to core values.*

III. SPECIFIC DUTIES OF NEW POSITION

- A. List the specific duties position will perform plus the approximate percentage of time to be spent on each duty.

Specific duties of this shared position include: serving as receptionist and general staff support, provide information to the public, scheduling appointments/inspections, assisting with evening immunization clinics, updating staff calendars, file and retrieve documents, data entry, distribute/process mail, cash receipting, assist with newsletters and mailings, preliminary permit application completion and processing, assist with permit issuance, test kit intake, cash receipting, document scanning and imaging, quality assurance of scanned documents for specific file management systems (Nightingale notes, Ascent permitting system, etc.), development of intranet/internet resources, online forms, applications and documents, website monitoring, and file management.

It is anticipated that the Administrative Assistant position will provide support to the POWTS, Zoning, and Conservation programs 70% of the time and the general office support activities listed above 30% of the time annually.

- B. Could another County department use the expertise of this position? OR could you use the expertise of another department to meet your needs? Why or why not?

The uniqueness of this position proposal does benefit more than one department and can serve as a "pilot" for future collaborative opportunities throughout the County which will ultimately benefit all Departments. This would be a new opportunity to maximize the use of technology and eliminate departmental "silos". The position could be physically sitting at MCHD but also doing CPZ work or vice versa. That alone will allow for full utilization of staffing resources.

- C. If the work is currently being done by the County, how is it being accomplished (contract basis, temporary help, current employee, etc.)? Why is this arrangement no longer acceptable?

Currently, the work at MCHD is being done by the .4 FTE position and at CPZ, some of this work is being done by the casual Administrative Assistant position and a casual Conservation Technician position. This arrangement is currently no longer acceptable because the .4 FTE at MCHD has recently submitted her retirement announcement and as previously explained, CPZ is experiencing program growth which is creating additional workload that other support staff cannot absorb.

At MCHD, there is a need for reception desk coverage, but because of increased use of technology and integration of self-service options there is reduced occupancy within the .4 FTE position. There has been an increase in the administrative assistant type workload within CPZ due to private onsite wastewater treatment system (POWTS) program expansion and zoning program that makes the casual position no longer adequate.

IV. POSITION COSTS AND FUNDING SOURCES

- A. What is the anticipated total cost of this position? (Include salary; benefits; office space, remodeling, furniture, and equipment; travel; and other applicable costs.)

The anticipated cost for a FTE Administrative Assistant with family health insurance coverage is \$58,610. The anticipated cost for a FTE Administrative Assistant at \$15/ hour with no health or dental insurance is \$36,294.

- B. Explain specifically how position will be funded. *The position would be funded by a MCHD Public Health Preparedness Grant, a CPZ Conservation grant, and CPZ fee revenues as follows:*

FUNDING SOURCE	AMOUNT	NOTES
<i>MCHD Grant Funds</i>	<i>\$ 7,259</i>	<i>Public Health Preparedness Grant</i>
<i>CPZ Grant Funds</i>	<i>\$ 8,711</i>	<i>CPZ Conservation Grant funds and fees</i>
<i>CPZ Permit Fees</i>	<i>\$ 20,324</i>	<i>POWTS/Zoning permit fees</i>
TOTALS	\$36,294	

NOTE: By using other funding sources, this proposal would reduce the 2020 budgeted tax levy for staff. If the positions were unchanged, the impact on the 2021 budgeted tax levy would be approximately \$18,000.

Length of outside funding: *Funding from additional sanitary permit revenue through the state mandated POWTS Maintenance program is expected through 2026. CPZ has been the one of the highest ranked counties for a number of years in terms of conservation grant funding and utilization and it is anticipated this will continue. State and federal agencies regularly contact CPZ directly and request us to apply for their grant funds. MCHD grant funds have been available for over 15 years and it is anticipated that these funds will continue to be available long term.*

Likelihood of funding renewal: High likelihood (automatic)

Would this outside funding be used to offset the levy if not used for this position?

CPZ and MCHD continually review outside funding sources for opportunities to offset tax levy. The MCHD grant funds used for this position requires the accomplishment of specific objectives therefore could not be used to offset tax levy elsewhere.

While increased revenues could be used to offset tax levy, CPZ anticipates that through this program expansion, additional revenues will need to be utilized to support and successfully implement the increased POWTS workload. The bottom-line is that it takes full time dedicated people to successfully implement long term programs to meet county strategic plan objectives and expected outcomes.

- C. Will the proposed position allow your department to increase revenues or decrease expenditures beyond the cost of the position? If yes, how?

Potentially yes. CPZ's estimates provided for increased revenues are very conservative and may exceed the cost of the position. So far in 2020, CPZ has seen a 39% increase in permits and this is anticipated to continue into the near future. This increase in permits equals approximately \$25,500 in additional revenue to date. CPZ intends to continue to engage citizens with failing septic systems and replacement requirements that will be a positive impact on Department revenues.

- D. Does the proposed position provide preventive services that will lead to cost avoidance or more extensive services in the future? OR Can the proposed position be justified as an investment with future benefits to the County greater than the cost of the position? If yes, how?

This shared consolidate position proposal will serve as a "pilot" for future opportunities throughout the

County that may lead to greater staff occupancy, potential for cost savings and more effectiveness/efficiencies in the future. Sharing staffing resources across departmental boundaries and increasing current staff occupancy will be a positive investment for the County.

E. Can the position costs be offset by eliminating or reducing a lower priority function? If yes, explain.

CPZ and MCHD continually evaluate programs for efficiencies/effectiveness and make adjustments as needed for cost savings and greater utilization of grant funds. CPZ proposed position costs are being offset by utilizing grant funding and consolidating duties from another casual position. This proposed position will primarily be assisting with Priority Based Budgeting Quartile 2 programs which are funded through fees and grants. Eliminating or reducing a lower priority function within each department to offset the cost of this position would need thoughtful consideration of impacts to programs since many of our department programs are interconnected. In addition, some grant funding cannot be shifted to other program areas since grant funds typically have defined objectives that the funding can be used for.

V. COMMITTEE OF JURISDICTION

What is the recommendation of the committee of jurisdiction?

Per email from Administration and per rule 4.2, this position request will be reviewed by Administration prior to any discussion before the committee of jurisdiction.

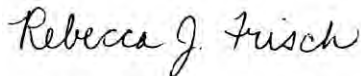
NOTE: An updated or new Position Description Questionnaire (PDQ) may be necessary to complete the job evaluation process.



Signature of Supervisor/Manager Completing Request

May 29, 2020

Date



Department Head Signature

May 29, 2020

Date

1 Full time Administrative Assistant in CPZ
 (.20 Health Dept and .80 FTE CPZ Dept)

2021 BUDGET PLANNING - NEW POSITION COST

Item	Projected 2021 Rates	Minimum	Mid-Point	Maximum	At \$15/hr No health or dental
DBM A12		\$27,975	\$32,170	\$37,458	\$31,200
Health - Family	\$1,963.00	\$23,556	\$23,556	\$23,556	\$0
Dental - Family	\$62.00	\$744	\$744	\$744	\$0
FICA Retirement Rate	6.20%	\$1,734	\$1,995	\$2,322	\$1,934
FICA Medicare Rate	1.45%	\$406	\$466	\$543	\$452
Unemployment Insurance	0.10%	\$28	\$32	\$37	\$31
Retirement - Employer	6.75%	\$1,888	\$2,171	\$2,528	\$2,106
Worker's Comp - Clerical	0.08%	\$22	\$26	\$30	\$25
PEHP	\$21	\$546	\$546	\$546	\$546
Total Estimated Cost 1 FTE		\$56,899	\$61,706	\$67,764	\$36,294

.40 FTE vacant position in Health Department would be reduced to .20 FTE and would be 100% funded by health depart grant. (\$7,259 grant and save approximately \$5,689 tax levy)

CPZ would use existing Conservation Grants and POWTS and Zoning Permit fees to fund remaining .80 FTE by reallocating dollars from Casual positions that were funding by grants and permit fees (\$29,035). And if needed to cover health & dental benefits still have approximately \$5,689 tax levy from Health savings and \$12,131 tax levy dollars from casual administrative assistant position that will not be filled.

HEALTH DEPT .40 FTE ALLOCATED POSITION ABSORBED BY CPZ					CPZ ELIMINATE TWO CASUAL POSITIONS	
Item	2020 Rates	Minimum	Mid-Point	Maximum	Casual Admin Asst 1500 hours @ \$15/hr	Casual CPZ Tech 1500 hours @ \$15/hr
DBM A12 Cost .40 FTE		\$11,190	\$12,868	\$14,983	\$22,500	\$22,500
Health - Family	\$1,800.51	\$0	\$0	\$0	\$0	\$0
Dental - Family	\$60.32	\$0	\$0	\$0	\$0	\$0
FICA Retirement Rate	6.20%	\$694	\$798	\$929	\$1,395	\$1,395
FICA Medicare Rate	1.45%	\$162	\$187	\$217	\$326	\$326
Unemployment Insurance	0.10%	\$11	\$13	\$15	\$23	\$23
Retirement - Employer	6.75%	\$0	\$0	\$0	\$0	\$0
Worker's Comp - Clerical	0.08%	\$9	\$10	\$12	\$18	\$18
PEHP	\$21	\$0	\$0	\$0	\$0	\$0
SAVINGS FROM .40 FTE POSITION		\$12,066	\$13,876	\$16,156	\$24,262	\$24,262

41% tax levy (\$5,689)

59% grants

50% tax levy (\$12,131)

50% grants & fees

100% grants & fees

Added Cost for .60 FTE addition: \$44,833 \$47,830 \$51,608

RESOLUTION #R-___-2020

TO CREATE TWO (2) 1.0 FTE SOCIAL SERVICE SPECIALIST POSITIONS FOR THE DEPARTMENT OF SOCIAL SERVICES

WHEREAS, the mission of the Department of Social Services is to strengthen individuals and families by coordinating and providing resources that promote safety and maximize independence to build a strong and healthy community; and

WHEREAS, creating these new positions support the mission statement, as the individuals will work with children and families on building the skills needed to improve health, promote wellness, ensure safety, and enhance overall quality of life for both the parent and child; and

WHEREAS, these positions will help promote family growth and development and the needed skills that will be life lasting and more likely to divert from the child welfare system; and

WHEREAS, these positions are being created to support Marathon County’s preparation for the Federal Family First Prevention Services Act (FFPSA) that will be effective in October 2020; and

WHEREAS, the purpose of the FFPSA is to “provide enhanced support to children and families and prevent foster care placements through the provision of mental health and substance abuse prevention and treatment services, in-home parent skill based programs”; and

WHEREAS, funding for said positions will be provided by the FFPSA in the amount of \$144,640. A budget amendment is needed in order to receive and disperse said funds; and

WHEREAS, on August 11, 2020, the Human Resources, Finance and Property Committee also voted to recommend creating two (2) 1.0 FTE Social Service Specialists to County Board.

WHEREAS, in order to fund these positions and services that they will provide § 65.90(5)(a), Wis. Stats., dictates that appropriations in the Marathon County budget may not be modified unless authorized by a vote of two-thirds of the entire membership of the County Board of Supervisors; and

NOW, THEREFORE, BE IT ORDAINED AND RESOLVED by the Board of Supervisors of the County of Marathon:

- A. To create two (2) 1.0 FTE Social Service Specialists, effective the beginning of the first pay period following the approval of this resolution.

Respectfully submitted this _____ day of August, 2020.

HUMAN RESOURCES, FINANCE AND PROPERTY COMMITTEE

Fiscal Impact: No tax levy impact. Funding for said positions will be provided by the Family First Allocation through Wisconsin Department of Children and Families, Basic Community Allocation in the amount of \$144,640.

APPENDIX B
NEW OR EXPANDED POSITION REQUEST

I. GENERAL INFORMATION

Department: Department of Social Services

Date: 07/17/2020

Position Requested: Social Services Specialist
(If unsure of classification, indicate "To be determined")

FT PT FTE _____%

Number of Positions: 2.0

Division Position Will Be Assigned To: Child Protective Service Ongoing Unit
(Indicate NA if not applicable)

Projected Start Date of Position: As soon as Possible

Priority Number of This Position: _____

If you are requesting more than one position, prioritize all your requests and indicate the priority number of position.

II. FULL EXPLANATION OF NEED FOR POSITION

A. Is this position request compatible with the County's mission statement?

Yes, the positions will support the health and safety of children and families by providing parents education and supportive services to improve their parenting capacities to stabilize family risk, ensure safety and decrease the rate out of home care placements.

B. What is your department's mission statement and how does position support this mission and/or department strategic plan?

These positions are essential to meet Objective 3.3 of the Strategic Plan to decrease the number of out of home care days.

Mission Statement: We strengthen individuals and families by coordinating and providing resources that promote safety and maximize independence to build a strong and healthy community.

The positions support the mission statement, as the individuals will work with children and families on building the skills needed to improve health, promote wellness, ensure safety, and enhance overall quality of life for both the parent and child. These positions will help promote family growth and development and the needed skills that will be life lasting and more likely to divert from the child welfare system.

C. Indicate reasons for asking for position including purpose of position, applicable workload data and trends, etc. **plus attach relevant supporting data.** If more than one position of the same classification is being requested, also justify the number requested.

The request is to create one (2) full-time positions with a job classification of Social Services Specialist. The purpose of these positions is to engage parents and families by working in tandem with social workers in family intervention to provide an array of supportive and educational services. The families will include children who are abused or neglected or adolescents who are out of control, truant, or delinquent.

These positions are being created to support Marathon County's preparation for the Federal Family First Prevention Services Act (FFPSA) that will be effective in October 2020. The purpose of the FFPSA is to "provide enhanced support to children and families and prevent foster care placements through the provision of mental health and substance abuse prevention and treatment services, in-home parent skill-based programs..." To accomplish this, federal IV-E funding which is currently the primary source of funding for out of home care, will be shifted to prevention and services to help keep children safe and supported at home. Child Welfare agencies will need to adapt the way services are provided to decrease the number of out of home care days, commensurate with available funding.

The positions will be key in providing additional support to parents to divert placement, and/or support the return of the child to the parental home, or to a lesser restrictive placement. This will be accomplished by providing a variety of services including, but not limited to, parent education, skill building, resource enhancement, modeling, and problem solving techniques.

- D. What benefit will the position provide to the County? How does the position improve/enhance customer service and/or address community needs?

These positions will better align the practice of child welfare to decrease out of home care days as required by the federal legislation. Without a strategically thought out plan to change the way services are provided, the likelihood of out of home care placement being reduced is low. This would result in an additional shift to county levy to fund the out of home care placements as IV-E funds are shifted to prevention.

These positions will allow for an increased ability to serve families in an intensive manner, in their home environments. The target population serviced are children who are at high risk of out of home placement because of abuse or neglect, uncontrollability, or are a danger to the community. These positions will also work with families whose children are in out of home placement and will give the parents the skills to have the child reunified in a shorter amount of time. In addition to providing parents with those needed services such as parent education, skill building, resource enhancement, modeling and problem solving techniques, these positions will also be an advocate and support for the parents to meet the needs of the child including, but not limited to, social and emotional development, language and literacy, cognition, and perceptual, motor, and physical development.

Face to face visits and family visitation for out of home care cases could occur within a parent's home once determined safe. This would allow the visit to occur in a realistic family setting, typically more comfortable for families, and also providing the parent educator to have a more in tune focus to the needs of the family in their natural environment. Additionally, families will be receiving support through one established evidenced based curriculum in their own home, and will be more likely to feel confident learning and applying new skills in their natural setting. This department will be reviewing two separate evidenced based parenting curriculums, Common Sense Parenting out of Boys Town, in Omaha Nebraska, and Safe care, a model recommended by the Department of Children and Families reference to the upcoming Family First Prevention Services Act initiative.

- E. Indicate any alternatives to creating this position that were considered and why you still chose to request the position?

The department could contract out for the service. However, an existing contract the department has with a community agency offering in-home parent education program doesn't have current capacity. Wait list and a lack of utilizing consistent parent modeling opportunities are not conducive to the goal we need to achieve. In addition, other community based service providers often are unprepared or unwilling to work with complex cases and high level of need many of our cases entail. Allowing these positions to be operated and supervised "in house" allows for increased oversight of the positions and facilitates stronger partnerships with the social workers and other programs operated by DSS. Having the right services for the right family at the right time is paramount to FFPSA. Being able to assign a MCDSS Social Service Specialist to provide the right level of service to the highest need children and parents will support families to prevent out of home placement.

- F. What will be the effect if the proposed position is not created?

In the event this position is not approved, MCDSS will have to continue, and attempt to increase services with contracted providers for supervised visitation services and additional contracts to provide increased parent education services to families. Children and families may not receive the support needed to maintain them in the home of a parent, or children may not be able to transition to a parental setting from a higher-cost/restrictive placement, resulting in continued or increased out of home placement costs that will eventually be shifted to county levy.

- G. What criteria will you use to monitor the effectiveness and performance of the position. (Increasing revenues, improved customer service, decreasing costs, enhancing services, etc?)

In CPS, there is an abundance of data used to measure safety of children, including: abuse/neglect reports, substantiations on open cases, re-entry into out of home care, and reunification. Additionally, these positions will identify specific goals they will work on with the family to improve parenting and address all safety concerns. Written case notes and review of goal achievements/barriers will be provided regularly to the social worker and supervisor. In addition, these positions will maintain a data tracking system to demonstrate program effectiveness through successful completion of the parenting program, pre and post test scores, re-entry into out of home, recidivism rate, and future substantiation rate six months post program completion. Furthermore, quality assurance calls with parents, community service providers, and social workers to garner satisfaction with the position and program will be implemented.

Ultimately, the positions' effectiveness will be measured in part by the out of home care rate for the families that they serve.

III. Specific Duties of New Position

- A. List the specific duties position will perform plus the approximate percentage of time to be spent on each duty.
- a. Direct provision of services to families:
Engages families, assesses safety, provide skill training and education, demonstrates resource enhancement and develops a supportive relationship with families. Teaches and provides support through demonstration, modeling, including parent child interaction, written materials, videos and parent groups. Establishes connections for families with necessary resources. These positions will require availability on weekdays to include evening hours, as well as weekends (Saturday and Sunday). 50%
 - b. Provides supervised visitation services in the community, clients' homes, and at the department. 10%
 - c. Provides transportation at supervisor direction. 5%
 - d. Provides services in an office setting, in a community setting, or a biological, guardian, or foster family's home. 10%
 - e. Accurately documents all client contacts timely in Electronic Wisconsin State Automated Child Welfare Information System (eWiSACWIS) and provides updates to social workers and supervisor. 10%
 - f. Creating and tracking program participants' goals and outcomes to closely monitor case progress, services provided, length of involvement and successful/completion of program. 10%
 - g. Other duties as assigned such as attending team meetings and trainings. 5%
- B. Could another County department use the expertise of this position? OR could you use the expertise of another department to meet your needs? Why or why not?

These positions will work with families who might also be served by other county or private agencies. Services would be coordinated, not duplicated. The two programs that are most closely related are Birth to Three and Start Right. The Birth to Three program offers education to families, however this education is specific to the child's specific needs or disability. Start Right provides parent education to parents of a limited age range (young) children, who are not generally at the higher risk level that the Department is legally responsible to serve; in addition the positions' scope of duty is broader than delivered by Start Right. Neither of those programs are designed to offer the range of services required for these positions at the intensity level required.

- C. If the work is currently being done by the County, how is it being accomplished (contract basis, temporary help, current employee, etc.)? Why is this arrangement no longer acceptable?

MCDSS has one current parent educator position, who is serving 22 families on average. That position has been focused on providing service to families that ranges from transportation, parent education, or supervising a family visit. The position has been successful and widely sought out for assistance by social workers. These new positions, while similar, are created to serve 10-12 families, more intensely and be involved quickly and at the right time to avoid placement. This includes individualized parent coaching and modeling, skill building, resource enhancement, problem solving techniques, and daily structure and routine that meet the needs of the family. Additionally, this allows for MCDSS to ensure an evidence based parenting model is utilized and can ensure services are provided that are in conjunction with the Family First Act that is scheduled to roll out in Fall 2020.

IV. POSITION COSTS AND FUNDING SOURCES

- A. What is the anticipated total cost of this position? (Include salary; benefits; office space, remodeling, furniture, and equipment; travel; and other applicable costs.)

The position is classified as a Social Services Specialist. For calendar year 2020, the total maximum estimated position cost for a Social Services Specialist position at mid-point is \$154, 898 (including salary and fringe). Additionally, this estimate assumes family benefit coverage. Included in the costs are anticipated mileage and training.

Funding for this program will be allocated from the increased Department of Children and Families (DCF) Basic County Allocation (BCA) set aside in the DSS budget to comply with Federal Family First Prevention Services Act.

- B. Explain specifically how position will be funded.

Amount of County tax levy: \$0 % of total costs: \$0

Amount of any outside funding: \$144, 640 % of total costs: 100%

Source of outside funding: Family First Allocation through DCF, Basic Community Allocation

Length of outside funding: Ongoing

Likelihood of funding renewal: High

Would this outside funding be used to offset the levy if not used for this position? Possibly for one year (2021) depending on the out of home care rate. As the federal funding (IV-E) shifts to prevention, not investing DCF Basic County Allocation in services to prevent out of home care placement will result in increased unfunded out of home care costs in subsequent years.

- C. Will the proposed position allow your department to increase revenues or decrease expenditures beyond the cost of the position? If yes, how?

Yes, a long term anticipated outcome is reduction of out of home care costs, both through preventing out of home placements and allowing children to return back to the home sooner. It is essential to decrease out of home care costs as federal funding to support these expenses will no longer be available at the level it currently is.

Furthermore, positions may help reduce costs in other contracted service areas for supervised visitation program, transportation and home safety services checks.

- D. Does the proposed position provide preventive services that will lead to cost avoidance or more extensive services in the future? OR Can the proposed position be justified as an investment with future benefits to the County greater than the cost of the position? If yes, how?

Yes, significant savings in early intervention programs are not only dollars saved in foster care, but also the improved quality of life for children and families in our community.

- E. Can the position costs be offset by eliminating or reducing a lower priority function? If yes, explain.

No.

V. COMMITTEE OF JURISDICTION

What is the recommendation of the committee of jurisdiction?

The Social Services Board will review the request at their August meeting.

NOTE: An updated or new Position Description Questionnaire (PDQ) may be necessary to complete the job evaluation process.

Signature of Supervisor/Manager Completing Request

Date

Department Head Signature

Date

Social Service Specialist - B22
 DEPARTMENT OF SOCIAL SERVICES
 FTE = 2.0

2021 NEW POSITION COSTING

Item	2020 Rates	Minimum	Control Point	Maximum
DBM B22		\$36,725	\$43,152	\$51,066
Health - Family	\$1,800.51	\$21,606	\$21,606	\$21,606
Dental - Family	\$60.32	\$724	\$724	\$724
FICA Retirement Rate	6.20%	\$2,277	\$2,675	\$3,166
FICA Medicare Rate	1.45%	\$533	\$626	\$740
Unemployment Insurance	0.10%	\$37	\$43	\$51
Retirement - Employer	6.75%	\$2,479	\$2,913	\$3,447
Worker's Comp - Clerical	0.08%	\$29	\$35	\$41
PEHP	\$21	\$546	\$546	\$546
Total Estimated Cost *		\$64,955	\$72,320	\$81,387

COST OF 2.0 FTE \$129,910.93 \$144,640.00 \$162,775.00



Sale Memorandum

To: Brian Lanser, Quarles & Brady, LLP (414) 277-5775
brian.lanser@quarles.com

From: Kristin A. Hanson, PFM Financial Advisors LLC (414) 847-5586
hansonk@pfm.com

cc: Kristi Palmer, Marathon County (715) 261-1172
Kristi.Palmer@co.marathon.wi.us

Date: August 4, 2020

Re: Board of Supervisors – Marathon County
General Obligation Health Care Project Building Bonds, Series 2020B

pfm

115 South 84th Street
Suite 315
Milwaukee, WI 53132
414.771.2700

pfm.com

Below are some the specifications needed for you to draft the necessary legal documents for the above referenced issue for the upcoming sale of the County's general obligation bonds:

PURPOSE: To finance the finance the next phase of the North Central Health Care ("NCHC") Master Facility Plan projects.

AMOUNT: \$17,845,000

PRICE: Not less than 99% of par (\$17,666,550) and not more than 102% of par (\$18,201,900).

SALE: Tuesday, September 15, 2020. Bid opening at 10:00 A.M. CDT, offices of PFM Financial Advisors, LLC, 115 South 84th Street, Suite 315, Milwaukee, WI 53124. Electronic bids maybe submitted by PARITY.

AWARD DATE: Tuesday, September 15th, 2020 at 7:30 P.M. CST

SALE METHOD: Competitive Sale.

AWARD: Based on the TIC computed from the delivery date.

DATED/DELIVERY DATE: Wednesday, October 7th, 2020

PRINCIPAL PAYMENTS: Annually, February 1, 2023 through 2040.

INTEREST: On each February 1 and August 1, commencing February 1, 2021. Interest will be computed on a 360-day year, 30-day month basis, to the owners of record as of the close of business on the fifteenth of the immediately preceding month.



**PAYMENT
SCHEDULE:**

February 1, as follows: (2023 to 2040)

<u>Year</u>	<u>Amount</u>	<u>Year</u>	<u>Amount</u>
2023	760,000	2032	995,000
2024	785,000	2033	1,025,000
2025	805,000	2034	1,055,000
2026	830,000	2035	1,090,000
2027	855,000	2036	1,120,000
2028	880,000	2037	1,155,000
2029	910,000	2038	1,190,000
2030	935,000	2039	1,225,000
2031	965,000	2040	1,265,000

DENOMINATION: \$5,000 or integral multiples thereof.

ADJUSTMENTS: The Board reserves the right to adjust the total par amount and individual maturities in multiples of \$5,000.

CALL FEATURE: The Bonds maturing on or after February 1, 2031, are subject to redemption prior to maturity at the option of the County on February 1, 2030 or on any date thereafter at a price of par plus accrued interest.

**NO TERM BOND
OPTION:** Proposals for the Bonds may not contain Term Bonds.

RATE: One rate per maturity expressed in integral multiples of 1/20 or 1/8 of 1%. No rate specified for any maturity may be lower than the interest rate specified for any earlier maturity. All Notes of the same maturity shall bear a single uniform rate from date of issue to maturity. Each bid must be for the entire principal amount of the Notes.

**QUALIFIED
TAX-EXEMPT
OBLIGATIONS:** The Notes will **NOT** be designated as "Qualified Tax-Exempt Obligations."

FORM: The Notes will be issued as book-entry securities.

PAYING AGENT: The Issuer

CUSIP NUMBERS: The County will assume no obligation for the assignment of CUSIP numbers on the Notes or for the correctness of any numbers printed thereon, but will permit such printing to be done at the expense of the purchaser, if the purchaser waives any extension of the time of delivery caused thereby.

INSURANCE: The Purchaser may purchase municipal insurance on this issue.

**GOOD FAITH
DEPOSIT:** 1% of the par amount of the Bonds. The successful bidder shall submit the Good Faith Deposit within two hours after verbal award is made.



**ESTABLISHMENT
OF ISSUE PRICE:**

In the event that the competitive sale requirements are not satisfied, the winning bidder will be required to hold the initial offering price to the public as of the sale date or using the first price at which 10% of each maturity of the Notes is sold to the public. (Subject to change prior to publishing the Notice of Sale)

**OFFICIAL
STATEMENT:**

The Official Statement will be prepared by PFM Financial Advisors LLC.

The Issuer will provide the successful bidder with a reasonable number of final Official Statements or a reasonably available electronic version of the same promptly after the sale date, but in no event later than seven (7) business days after such date.

ACTION:

Please provide the appropriate legal documents to the Issuer and PFM when they are available.

RESOLUTION NO. _____

RESOLUTION PROVIDING FOR THE SALE OF NOT TO EXCEED
\$17,845,000 GENERAL OBLIGATION HEALTH CARE
PROJECT BUILDING BONDS, SERIES 2020B

WHEREAS, on June 19, 2018, the County Board of Supervisors of Marathon County, Wisconsin (the "County") adopted an initial resolution (the "Initial Resolution"), by a vote of at least 3/4 of the members-elect, authorizing the issuance of general obligation bonds or promissory notes in the principal amount not to exceed \$67,000,000 for the public purpose of financing North Central Health Care ("NCHC") Master Facility Plan projects, including the design and construction of building additions, renovations and landscaping to the NCHC Center and Mount View Care Center campus;

WHEREAS, the County has previously issued general obligation promissory notes in the principal amount of \$7,775,000 for projects authorized by the Initial Resolution; and

WHEREAS, it has now been determined to issue general obligation bonds authorized by the Initial Resolution in an amount not to exceed \$17,845,000 for NCHC Master Facility Plan projects;

NOW, THEREFORE, BE IT RESOLVED that:

Section 1. Issuance of the Bonds. The County shall issue general obligation bonds authorized by the Initial Resolution in an amount not to exceed \$17,845,000 for the purpose above specified, which bonds shall be designated "General Obligation Health Care Project Building Bonds, Series 2020B" (the "Bonds").

Section 2. Sale of Bonds. The County Board of Supervisors hereby authorizes and directs that the Bonds be offered for public sale. At a subsequent meeting, the County Board of Supervisors shall consider such bids for the Bonds as may have been received and take action thereon.

Section 3. Notice of Sale. The County Clerk be and hereby is directed to cause notice of the sale of the Bonds to be disseminated at such times and in such manner as the County Clerk may determine and to cause copies of a complete, official Notice of Sale and other pertinent data to be forwarded to interested bidders as the County Clerk may determine.

Section 4. Official Statement. The County Clerk shall cause an Official Statement concerning this issue to be prepared by PFM Financial Advisors LLC. The appropriate County officials shall determine when the Official Statement is final for purposes of Securities and Exchange Commission Rule 15c2-12 and shall certify said Statement, such certification to constitute full authorization of such Statement under this resolution.

Section 5. Conflicting Resolutions; Severability; Effective Date. All prior resolutions, rules or other actions of the County Board of Supervisors or any parts thereof in conflict with the provisions hereof shall be, and the same are, hereby rescinded insofar as the same may so

conflict. In the event that any one or more provisions hereof shall for any reason be held to be illegal or invalid, such illegality or invalidity shall not affect any other provisions hereof. The foregoing shall take effect immediately upon adoption and approval in the manner provided by law.

Adopted and recorded August 18, 2020.

HUMAN RESOURCES, FINANCE AND PROPERTY COMMITTEE

_____	_____
_____	_____
_____	_____
_____	_____

Fiscal Impact:

Kurt Gibbs
Chairperson

Attest:

Kim Trueblood
County Clerk



Marathon County

Capital Improvement Program Committee Minutes

July 29, 2020

Members Present: EJ Stark, Sandi Cihlar, Chuck Kornack, Barkley Anderson, Eric Budleski, Kelley Gabor, Dave Overbeck

Excused:

Technical Staff: Terry Kaiser, Troy Torgerson, Craig Christians, Cindy DeBroux

Others Present: Lance Leonhard, Gary Radunz, Ann Herda-Rapp, Gerry Klein (phone)

1. Call to Order.

The agenda being properly posted and a quorum being present, the meeting was called to order at 10:00 am by Chair Stark. The meeting was held via web and in the North Central Health Care (NCHC) Theater at 1000 Lakeview Dr, Wausau, WI.

2. Public Comment Period – Not to Exceed 15 Minutes.

None.

3. Approval of the Minutes of the July 28, 2020 Capital Improvement Program Committee Meeting.

- A. **Motion**/second by Budleski/Cihlar to approve the minutes of the July 28, 2020 meeting. Motion **carried** on voice vote, no dissent.

4. Rank University of Wisconsin Stevens Point at Wausau Projects.

Mr. Radunz gave a brief description of three projects (1) Building HVAC Control System Upgrade, (2) Parking Lot "C" Replacement and (3) Roof Replacement of Heating Plant. After discussion the Committee ranked all three projects.

5. City County Information Technology Department Projects.

Mr. Klein called in and gave a brief description of a project (1) Financial/Human Resource Management Solution and recurring projects. These projects are not ranked by the Committee and were informational only.

6. Rank Facilities and Capital Management Projects.

Mr. Torgerson and Mr. Christians gave brief descriptions of nine projects. Projects (1) HVAC Design Services for Steam Removal at NCHC Campus, (2) NCHC Campus A & B Building Architecture/Engineering for Renovation to move Social Services to Lake View Campus, (4) Envelope Repairs on Lake View Professional Plaza Building at NCHC, (5) Lake View Professional Plaza Window Replacement, (6) HVAC Design Services for Jail Admin and Kitchen, (7) Courthouse (South) Penthouse Roof, (8) A & B Unit Roof Replacement at NCHC Campus and (9) West Street Fire and Security System Replacement. After discussion the Committee ranked all of the above. Project (3) Library Roof Replacement was not ranked, as this was already approved by the County Board. After reviewing the ranked projects a

- A. **Motion**/second by Kornack/Gabor to have Mr. Leonhard present the (tentative) list of ranked projects to the Human Resources, Finance and Property Committee to get direction if further action is needed. Motion **carried** on voice vote, no dissent. Mr. Leonhard will provide the results at the next CIP Committee meeting.

7. Project Updates.

The Committee agreed to wait for updates at the next CIP Committee Meeting.

8. Announcements.

The Committee agreed to cancel the July 30, 2020 and August 10, 2020 meetings. A CIP Committee Meeting will be determined at a later date.

9. Adjourn.

- A. **Motion**/second by Kornack/Gabor to adjourn the meeting. Motion **carried** on voice vote, no dissent.
Meeting adjourned at 1:40 pm. cd.

DRAFT 2021 CIP PROJECT REQUESTS

PAGE 1 OF 1

TYPE	DEPARTMENT	PROEJCT REQUEST COST	YEARS PREVIOUSLY FUNDED	ASSIGNED #	PROJECT DESCRIPTION	PROJECT RANK
PROJECTS NOT FUNDED BY CIP						
Imp	HWY	?	Continuous		Bituminous Surfacing.	
Imp	HWY	?	Continuous		Replace and Rehabilitate County Bridges and Culverts.	
Imp	HWY	?	Continuous		Replace and Rehabilitate Federally Funded Bridges and Culverts.	
Imp	HWY	?	Continuous		Replace and Rehabilitate Municipality Funded Bridges and Culverts.	
Imp	CWA	?	N/A		Runway Decoupling.	
Imp	Solid Waste	\$168,500	N/A		Vehicle Scale.	
	Sub Total	\$168,500				
RECURRING PROJECTS						
Imp	FCM	\$50,000	Recurring		County Facility Parking Lot Fund s/b @ \$50,000.	
Imp	HWY	\$300,000	Recurring		Right-of-Way Fund s/b @ \$300,000.	
	Sub Total	\$350,000				
TECHNOLOGY PROJECTS @ % \$						
Equip	CCIT	\$166,000	Recurring		PC Upgrade Fund.	
Equip	CCIT	\$101,000	Recurring		Network / Server Upgrade Fund.	
Equip	CCIT	\$40,000	Recurring		Video Equipment Upgrade Fund.	
Equip	CCIT	\$40,000	Recurring		Voice Equipment / Phone System Upgrade Fund.	
Equip	CCIT	\$1,500,000	Recurring		Financial/HR Management Solution.	
Equip	CCIT	\$150,000			Technology Small Capital.	
	Sub Total	\$1,997,000				
ROLLING STOCK						
Equip	FCM	\$40,000		21BM-01R	Rolling Stock.	
Equip	FCM / CPZ	?	Recurring	21BM02R	Rolling Stock Lease - Enterprise Fleet Management.	
Equip	PR&F	\$173,460	Recurring	21PO-01R	Rolling Stock Fund s/b @ \$173,460.	
Equip	Sheriff	\$333,696	Recurring	21SH-01R	Rolling Stock Fund s/b @ \$333,696.	
Equip	HWY	\$957,600	Recurring	21HI-01R	Rolling Stock Fund s/b @ \$957,600.	
	Sub Total	\$1,504,756				
PROJECTS RANKED IN PRIORITY ORDER BY CIP COMMITTEE						
Bldg	Medical Examiner	?		Informational	Marathon County Regional Forensic Science Center.	N/A
Imp	FCM	\$526,764	2019	21BM-03C	Library Roof Replacement.	N/A
Imp	Sheriff	\$200,000		21SH-02C	Jail Gym Skylight Replacement.	140
Imp	FCM	\$75,000	2020	21BM-01C	HVAC Design Services for Steam Removal at NCHC Campus.	137
Imp	FCM	\$688,000		21BM-05C	LVPP Window Replacement.	134
Imp	PR&F	\$250,000	2018, 2020	21PO-02C	Big Eau Pleine Road Repairs.	128
Imp	FCM	\$49,800		21BM-06C	HVAC Design Services - Jail Admin and Kitchen.	113
Imp	FCM	\$80,625		21BM-09C	West Street Fire and Security System Replacement.	113
Imp	Sheriff	\$500,000		21SH-01C	Juvenile Facility Roof Replacement.	110
Imp	HWY	\$190,000		21HI-01C	County Road "L" Beaver Creek.	106
Imp	PR&F	\$600,000	2020	21PO-01C	Playground Replacement.	105
Imp	UW	\$175,000		21UM-02C	Parking Lot "C" Replacement.	105
Imp	FCM	\$80,500		21BM-07C	Courthouse - South Penthouse Roof.	100
Imp	UW	\$825,000		21UM-01C	Bldg HVAC Control System Upgrade.	99
Imp	FCM	\$225,000		21BM-04C	Envelope Repairs on LVPP Building at NCHC.	97
Imp	UW	\$53,300	2020	21UM-03C	Heating Plant Roof Replacement.	95
Imp	HWY	\$125,000		21HI-02C	County Road "O" Four Mile Creek.	93
Imp	PR&F	\$50,000	2018	21PO-04C	Park Restroom Replacement.	86
Imp	FCM	\$380,000		21BM-08C	A&B Unit Roof Replacement at NCHC Campus.	86
Imp	PR&F	\$35,000		21PO-05C	Big Eau Pleine Horse Barn Replacement.	72
Imp	FCM	\$381,232		21BM-02C	NCHC Campus A&B Bldg - Arch/Eng for Renovation to Move Social Services to Lake View Campus.	66
Imp	HWY	\$55,000		21HI-03C	County Road "N" & "R" Upgrade.	65
Imp	PR&F	\$35,000		21PO-06C	Marathon Park Marquee.	60
Imp	PR&F	\$50,000		21PO-03C	Marathon Park - Westside Master Plan.	47
	Sub Total	\$5,630,221				
2021 Total of All Project Requests		\$9,650,477				

Marathon County

Owner (s):
 Edit
FEEHRER, RONALD D

Location:
 Edit
Govt. Lot 3, Sect. 29, T27N, R7E

Mailing Address:
 Edit
**RONALD D FEEHRER
 211 MAIN ST
 MOSINEE, WI 54455**

School District:
 Edit
3787 - MOSINEE

Tax Parcel ID Number: Tax District: Status:
 Edit **251-CITY OF MOSINEE** Edit
251-2707-295-1066 **Active**

Alternate Tax Parcel Number: Government Owned: Acres:
 Edit Edit Edit
53-0550-006-001-00-00 **0.0000**

Description - Comments (Please see Documents tab below for related documents. For a complete legal description, see recorded document.):
 Edit

**CITY OF MOSINEE
 PT OF LOT 1 BLK 6 COM AT MOST WLY COR OF L 1 NELY 40' SELY AT RT ANG
 20' SWLY AT RT ANG 40' NWLY ALG MAIN ST 20' TO BEG**

Site Address (es): (Site address may not be verified and could be incorrect. DO NOT use the site address in lieu of legal description.)
 Edit
211 MAIN ST MOSINEE, WI 54455

1 Lottery credit claimed effective 9/5/2019

Tax History

* Click on a Tax Year for detailed payment information.

Tax Year*	Tax Bill	Taxes Paid	Taxes Due	Interest	Penalty	Fees	Total Payoff
2019	\$1,483.20	\$0.00	\$1,483.20	\$103.83	\$51.91	\$0.00	\$1,638.94
2018	\$3,168.08	\$0.00	\$3,168.08	\$601.94	\$300.97	\$0.00	\$4,070.99
2017	\$1,240.08	\$0.00	\$1,240.08	\$384.42	\$192.21	\$0.00	\$1,816.71
2016	\$1,358.83	\$0.00	\$1,358.83	\$584.29	\$292.15	\$0.00	\$2,235.27
2015	\$1,491.71	\$0.00	\$1,491.71	\$820.44	\$410.22	\$33.80	\$2,756.17
2014	\$1,320.13	\$0.00	\$1,320.13	\$884.49	\$442.24	\$0.00	\$2,646.86
2013	\$1,196.00	\$0.00	\$1,196.00	\$944.84	\$472.42	\$0.00	\$2,613.26
2012	\$1,255.96	\$0.00	\$1,255.96	\$1,142.92	\$571.47	\$0.00	\$2,970.35
2011	\$4,262.42	\$281.89	\$3,980.53	\$4,099.94	\$2,049.97	\$0.00	\$10,130.44
Total							\$30,878.99

'PAY TAXES' button may be used to pay the SECOND installment for all municipalities except for the City of Wausau. It may also be used to pay past year delinquent taxes for all municipalities. If the first installment is not received by the municipality by January 31 of the year due, interest and penalty will also be due. Please contact the County Treasurer's Office at (715) 261-1150 for exact amount due if after January 31 or if taxes are 3 years or more delinquent.

NOTE: Current year tax bills may not be processed by the county.

Interest and penalty on delinquent taxes are calculated to **August 31, 2020.**



Health Department
1000 Lake View Drive, Suite 100
Wausau, WI 54403-6797

Tel/TDD: 715-261-1900
Fax: 715-261-1901
www.co.marathon.wi.us

April 24, 2020

Pin # 251-2707-295-1066

Audrey Jensen
Marathon County Treasurer
500 Forest Street
Wausau, WI 54403

Dear Ms. Jensen:

Per your request, an Environmental Transaction Screen (ETS) has been conducted for the Ronald Feehrer property located at 211 Main St. Mosinee, WI. The transaction screen was conducted by Keith Baine, Environmental Health Sanitarian. The purpose of this investigation was to review past and present land use practices, current operations and conditions, and identify the potential presence of hazardous substances, to evaluate the potential occurrence of soil and/or /groundwater contamination at the site. No soil or groundwater sampling was conducted in conjunction with this assessment.

The subject property is a 20' by 40' city lot. The property is located in the City of Mosinee part of Lot 1, block 6 Marathon County, Wisconsin. A two story brick building is on the lot. The property appeared to be vacant at the time of the inspection. No entry into the interior structure was permitted. The property is serviced by municipal sewer and water.

Based on visual observations made during the site visit on April 24, 2020 and the records review of the property, the following items have been identified as potential sources of contamination on the property.

Findings:

- A) Numerous contaminated sites were located during the search. See attached map for locations of these sites. Riiser Oil Station #12 and the Mosinee Telephone Co have continuing obligations while the remaining two sites have been closed by the Wisconsin Department of Natural Resources.

Recommendations:

Potential dangers to the property have been listed above. There would appear to be no major impediments to the County assuming ownership of the property.

The findings and recommendations presented above are professional opinions based solely upon visual observations of the site and vicinity, and our interpretation of the available historical information and documents reviewed. The report is intended for the exclusive use of Marathon County. It should be recognized that this assessment was not intended to be a definitive investigation of contamination at the subject property. Given that analytical testing for contamination was not performed, it is possible that currently unrecognized contamination may exist at the site. Opinions and recommendations presented herein apply to the site conditions existing at the time of our investigation and those reasonably foreseeable.

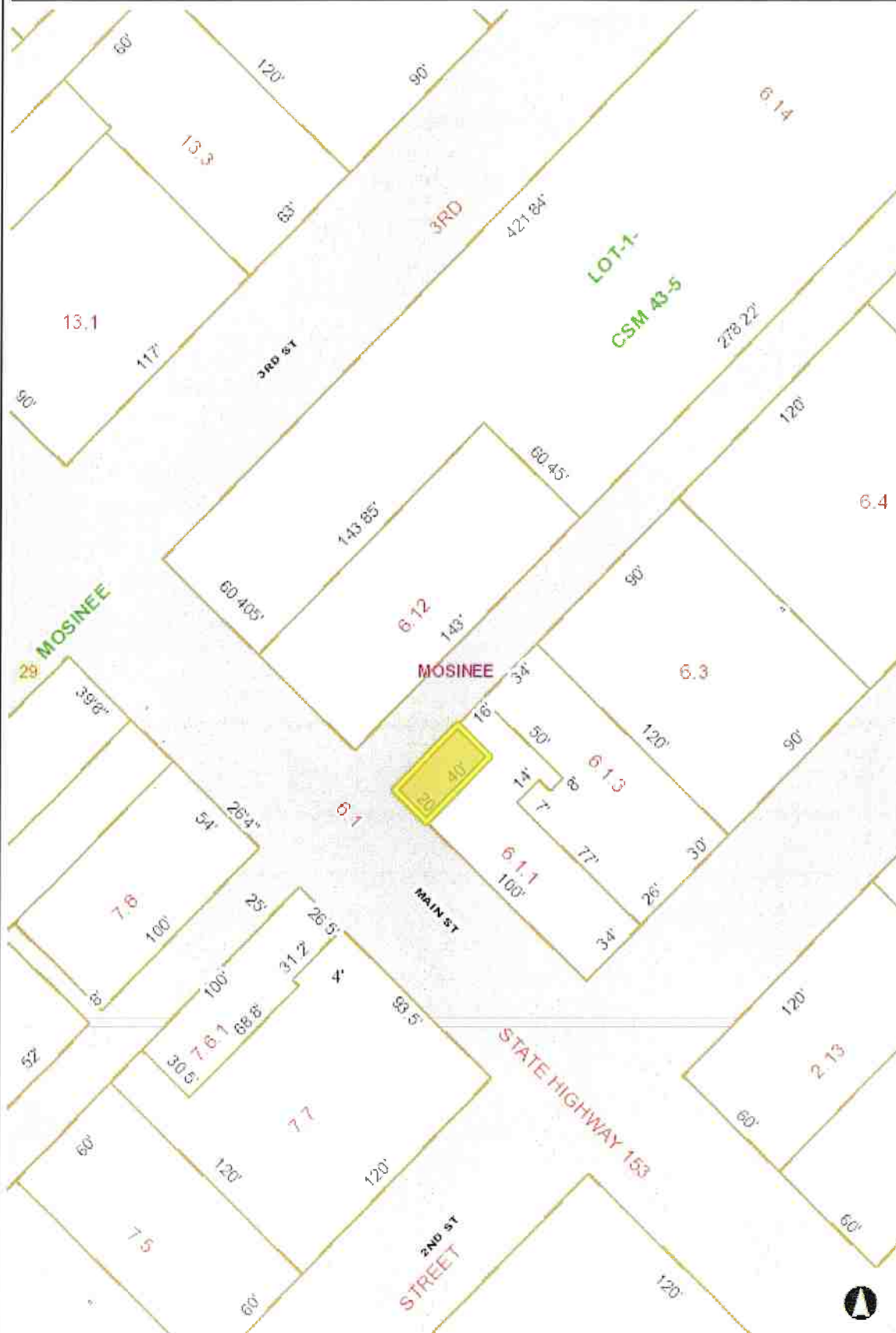
If you have any questions, please call.

Sincerely,

A handwritten signature in cursive script that reads "Keith Baine".

Keith Baine
Environmental Health Sanitarian

cc: D. Grosskurth, MCHD



Legend

- Parcel Annotations
- Parcels
- Land Hooks
- Section Lines/Numbers
- Right Of Ways
- Municipalities
- Surrounding_Counties
- CLARK
- LANGLADE
- LINCOLN
- PORTAGE
- SHAWANO
- TAYLOR
- WAUPACA
- WOOD

Notes



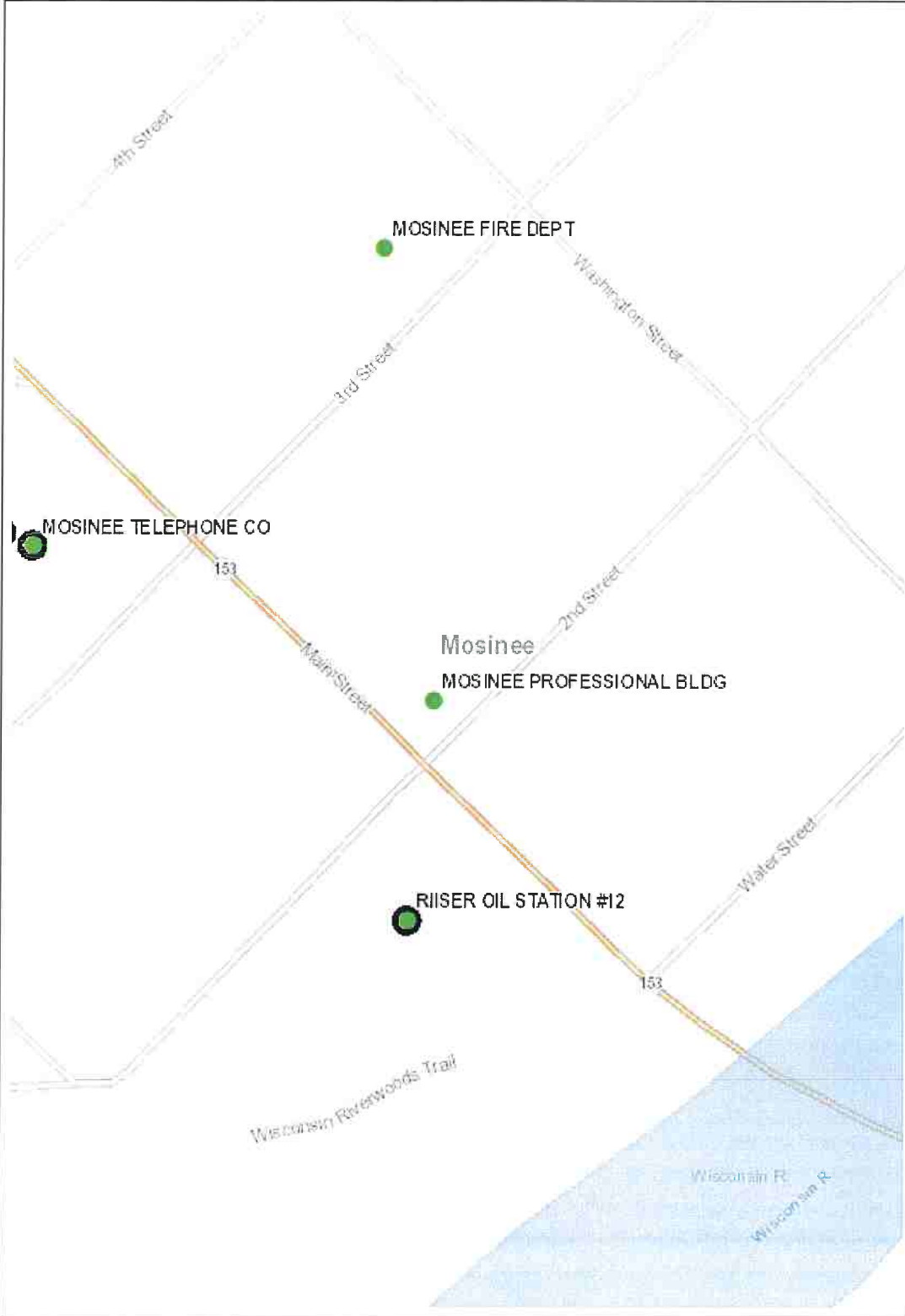
33.08 0 33.08 Feet



DISCLAIMER: The information and depictions herein are for informational purposes and Marathon County-City of Wausau specifically disclaims accuracy in this reproduction and specifically admonishes and advises that if specific and precise accuracy is required, the same should be determined by procurement of certified maps, surveys, plats, Flood Insurance Studies, or other official means. Marathon County-City of Wausau will not be responsible for any damages which result from third party use of the information and depictions herein or for use which ignores this warning.



Ronald Feehrer 211 Main St. Mosinee, WI



Legend

- Open Site
- Closed Site
- Continuing Obligations Apply

0.0 0 0.0 Miles

NAD_1983_HARN_Wisconsin_TM

DISCLAIMER: The information shown on these maps has been obtained from various sources, and are of varying age, reliability and resolution. These maps are not intended to be used for navigation, nor are these maps an authoritative source of information about legal land ownership or public access. No warranty, expressed or implied, is made regarding accuracy, applicability for a particular use, completeness, or legality of the information depicted on this map. For more information, see the DNR Legal Notices web page: <http://dnr.wi.gov/org/legal/>

Note: Not all sites are mapped.

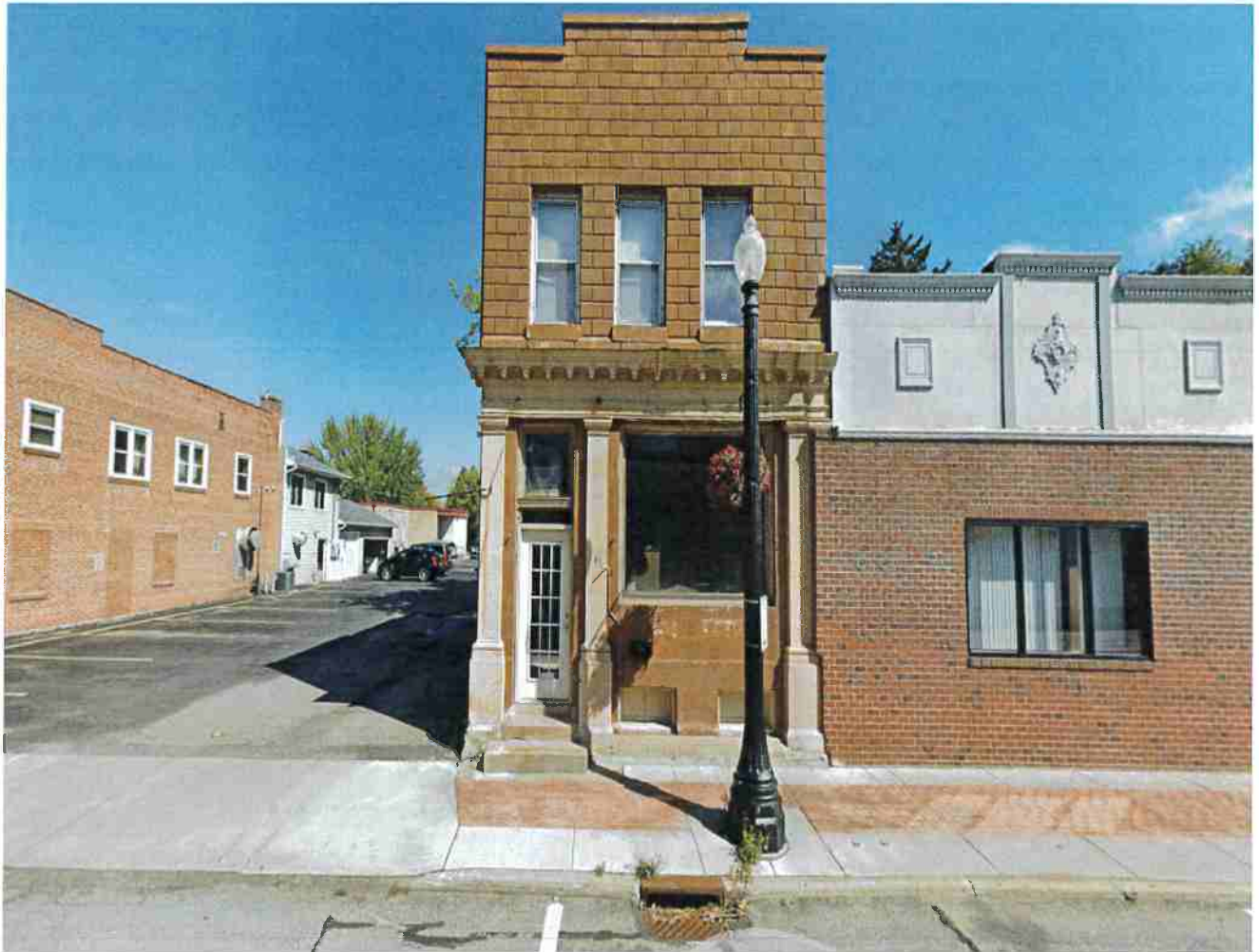
1:1,980



Notes

Ronald Feehrer
211 Main St.
Mosinee, WI

(Street view)



Ronald Feehrer
211 Main St.
Mosinee, WI



MARATHON COUNTY REQUEST FOR RECLASSIFICATION - 2021

Revised 7/29/2020

Current Position Information							2021 Reclass Recommendation (Effective January 10, 2021) (Recommendations after analysis by ERD)					APPROVED BY HR/FP COMM YES or NO	
Dept.	PCN	Incumbent Name	Current Hourly Rate (5/2020)	Occ Code	Current Classification (Working Title)	Current DBM	Occ Code	New Classification	NEW DBM	New Hourly Rate or no change	2021 Budget Impact		
1	Clerk of Courts	4006 4100 4101	Kim Uttech (60232) Linda Maher (62483) Judith Becker-Smith (63977)	\$26.11 \$25.49 \$24.98	5024	Administrative Supervisor (Register in Probate) (Court Services Supervisor) (Administrative Supervisor)	B31	New	Clerk of Courts Supervisor	B32	\$27.35 \$26.50 \$26.50	\$8,987	
2	Clerk of Courts	4114	Wendy McCarthy (61299)	\$18.95	5022	Administrative Specialist (Deputy Register in Probate)	B21	5015	Criminal Justice Specialist	B22	\$19.50	\$1,310	
3	Medical Examiner	7001	Jessica Blahnik (63218)	\$40.10	5342	Medical Examiner	C52	5342	Medical Examiner	D61	No Change	NONE	
4	Solid Waste	27050	Eric Olson (63912)	\$21.22	5432	Waste Management Specialist (Environmental Gas Technician)	B22	5233	Senior Maintenance Specialist	B23	\$21.87	\$1,561	
5	ADRC Informational Only	3010	Brittany Boyer (64593)	\$31.93	5405	Senior Social Service Professional (Benefits Specialist Supervisor ADRC)	C43	New	Benefits Specialist Supervisor ADRC	C51	No Change	NONE	NA
Total 2021 Budget Impact: Includes mandated expenses tied to wages - (FICA, UI, WRS & WC)											\$11,858		

2021 POSITION RECLASSIFICATION REPORT

Department: Clerk of Courts
Current Classification and DBM: Administrative Supervisor B31

Requested Classification (DBM): C42
Incumbents: Linda Maher
Judith Becker-Smith
Kim Uttech, Register in Probate

Employee Resources

Recommendation: Reclassify from B31 to B32.

Summary: Over the last several years the Clerk of Courts office has seen significant change in the manner of process and procedures in the courts. The supervisors in their respective areas of expertise have had to take the initiative to prepare and implement these changes throughout the Clerk of Courts Office. These changes have impacted all staff, including providing guidance and direction to the Judicial Assistants and Judges. Supervisors are responsible for the intake of filings and disseminating appropriately. They must also comply with Wis. Stat. 801.15 for purposes of ensuring orders are being held electronically under a statutory 10 day rule (or less) to allow for objections. Furthermore, they are responsible to ensure that all filings are processed within 24 hours. In the past, this process needed to be completed within three days of receipt.

Supervisors in the Clerk of Courts office are directly involved in the hiring, performance evaluations, discipline, training, and delegation of work assignments. They are also required to be cross trained in each other's role and responsibility to ensure no interruption in the quality of services delivered in the absence of a team member.

The courts have also seen an increase in the complexity and volume of cases. An increase in the knowledge and uses of technology within the Clerk of Courts Office and in the courtroom has also increase the education and training needed for the appropriate staff members. The variety and complexity of caseloads presented has continued to increase in our courtrooms. In addition to the knowledge of courtroom proceedings and the judicial system, the Administrative Supervisors must demonstrate exceptional skills to include leadership, multi-tasking, problem-solving, attention to detail, the ability to working a fast paced, demanding and ever changing environment where independent decisions are required.

After review of the requirements of these positions compared to other supervisory positions across other county departments, these responsibilities support the position being reclassified.

Final Recommendation: After reviewing the classification structure, and applying the Decision Band Method of Job Evaluation, it has been determined that these positions perform responsibilities that require independent decision making, involves complex tasks, and the administration of performance feedback for subordinates. It is the recommendation of the Employee Resources Department to reclassify the Administrative Supervisor Classification from B31 to B32. This recommendation better aligns supervisory responsibilities throughout the county classification system in a consistent and fair manner.

Employee Resources supports the following increase in hourly rates effective 1/10/2021.

Employee	Current Rate	New Rate
Kim Uttech	\$26.11	\$27.35
Linda Maher	\$25.49	\$26.50
Judith Becker-Smith	\$24.98	\$26.50

2021 Total Fiscal Impact: \$8,987

Submitted by: Sue Fox & Boly Vang

Reclassification/Pay Grade Adjustment

Clerk of Courts Office - Administrative Supervisors
Recommendation from B31 to B32

3 Full time Employees 100.00%
Annual Hours 2080

Current DBM

Item	Projected 2021 Rates	Minimum	Mid-Point	Maximum
		\$21.03	\$24.71	\$29.24
DBM B31 - Wages		\$43,742	\$51,397	\$60,819
FICA Retirement	6.20%	\$2,712	\$3,187	\$3,771
FICA Medicare Rate	1.45%	\$634	\$745	\$882
Unemployment Insurance	0.10%	\$44	\$51	\$61
Retirement - Employer	6.75%	\$2,953	\$3,469	\$4,105
Worker's Comp - Clerical	0.08%	\$35	\$41	\$49
Estimated Cost		\$50,120	\$58,890	\$69,687

Proposed DBM and Wage Increase to Hourly Rate Effective pay period 1/10/2021

Item	Projected 2021 Rates	Minimum	Mid-Point	Maximum
		\$23.27	\$27.35	\$32.36
DBM B32 - Wages		\$48,402	\$56,888	\$67,309
FICA Retirement	6.20%	\$3,001	\$3,527	\$4,173
FICA Medicare Rate	1.45%	\$702	\$825	\$976
Unemployment Insurance	0.10%	\$48	\$57	\$67
Retirement - Employer	6.75%	\$3,267	\$3,840	\$4,543
Worker's Comp - Clerical	0.08%	\$39	\$46	\$54
Estimated Cost		\$55,459	\$65,183	\$77,122
Cost to Reclass from B31 to B32:		\$5,338	\$6,293	\$7,435
Cost to Reclass THREE full time positions:		\$16,015	\$18,880	\$22,304

Three Employees in ths position:	Current Rate	Requested Rate	2021 Budget Impact
	From DBM B31	To DBM B32	
Kim Uttech (60232)	\$26.11	\$27.35	\$2,957
Linda Maher (62483)	\$25.49	\$26.50	\$2,407
Judith Becker-Smith (63977)	\$24.98	\$26.50	\$3,623
Fiscal Impact	\$76.58	\$80.35	\$8,987

APPENDIX A
Classification Review Request - Updated 3/25/15

Employee Resources Department accepts request for classification review during the month of April – April 1st through April 30th.

Your Name: Kim Uttech,
Linda Maher and
Judith Becker-Smith

Your Supervisor's Name: Shirley Lang

Your Division: Clerk of Courts Office/Probate

Your Department: Probate, Civil, Appeals, Records, Criminal, Traffic

Your Current Classification: B31

- My job has changed since I filled out my PDQ. (Attach a new or updated PDQ)
When updating the prior PDQ, make all changes in **red** on the original PDQ before submitting it to the Employee Resources Department.

Requested Classification: C42

Please specify why you believe the requested classification is more appropriate for your position than the current classification. Relate duties you perform to the essential duties and class concept listed for the requested classification:

We believe the requested job classification is more appropriate and justified than our current one due to the tremendous changes we have seen in our job responsibilities over the past few years. Administrative supervisors, under previous management alone, did not have as much latitude within their jobs as they do today. Administrative Supervisors are significantly more involved in a profound yet positive way. Currently we are recognized as B31 and our rate of pay is the same as those classified as B24. Therefore, within our office alone, Judicial Assistants are making the same rate of pay as us, if not more. In researching other counties, the rate of pay for Judicial Assistants is lower than that of the administrative supervisors and we believe that it should be the same for Marathon County.

Since 2016 we have tirelessly worked to transition from paper to electronic filing while maintaining a shared purpose with our staff as well as our internal and external customers. As CCAP continues to develop and increase our capabilities of becoming a paperless environment, we are optimizing new processes and procedures daily. On average, since the push, CCAP transmits weekly updates to our program. We recently have been working on matters that involve juvenile and probate case types as well as injunctions and complex forfeitures to name a few. The Department of Corrections will soon be joining our efilng process once the interface has been completed and pilot counties have been successful.

Managing all of these updates have significantly changed our job descriptions by increasing our responsibilities while removing responsibilities from the Judicial Assistants. For example, all mail in the past used to go to the Judicial Assistants for processing. Now, 95% of our filings come through our e-filing system. We are responsible for managing this intake and disseminating it appropriately. We are also responsible for following statutory guidelines under Wis. Stat. 801.15 for purposes of ensuring orders are being held electronically under a statutory 10 day rule (or less) to allow time for objections. Furthermore, we are now responsible for ensuring all filings are processed within 24 hours of being filed. Prior to e-filing, the standard goal of our office was to process all filings within 3 days of receipt. Often times paperwork was not received from the branches until after proceedings had already taken place. We are now responsible for ensuring all filings are processed, linked, sent to Judicial Assistants queues as well as Orders being placed in the Judges queues for signing. All of this needs to be done prior to the commencement of a scheduled hearing.

It is no secret that our country is facing a drug epidemic. This certainly has increased the management of workflow and case files for many case types such as criminal, forfeitures, CHIPS and JIPS as well as delinquencies. It has even led to an increased amount of small claims actions, family matters such as paternity and divorce as well as terminations or parental rights, mental commitments and guardianships. Overall, this epidemic has radiated throughout the entire justice system that has resulted in a shift in priorities and work flow not only in our positions but in other departments as well. Over the past year, our Judges have been pushing the state for a 6th judge for our county due to the influx in cases. On or about March 5, 2020, Governor Evers signed into place Act 184. Marathon County has been allotted one of these judges. Overall, one cannot deny the shift in responsibilities for those affected by the drug epidemic.

Finally, our rate of pay must not be the same as the Judicial Assistants. Our job responsibilities have superseded theirs not only due to e-filing and the drug epidemic but most importantly, they receive directive from us. These directives involve new processes and procedures stemming from court operations, statutes, CCAP processing updates as well as the District 9 Court Administrator. We are responsible for staying on top of these changes for all staff, including the Judicial Assistants. We supervise staff, interview individuals to fill positions, issue write-ups, perform reviews and round quarterly. We are responsible for instilling culture in our department and making sure everyone abides by that culture. We are responsible for disciplining those who are underperforming and ensuring they are successful. All staff, including the Judicial Assistants, rely on us for continual guidance on operational procedures as well as statutory compliance. We even advise judges as to case issues and procedure in how to proceed statutorily.

In summary, our jobs as supervisors have increased tremendously over the past few years and we expect it to remain that way if not continue to grow. We are currently classified as B31 and we feel our responsibilities fall under C42. As stated earlier, our salary range should not be the same as those of a lower classification, especially if we are responsible for supervising those individuals. The job duties of the Judicial Assistants have declined significantly over the past few years and the supervisors have assumed those additional responsibilities. A list of our responsibilities has been included with this appeal. We do feel our request for a reclassification is justified for the reasons stated above; therefore, we are respectfully asking for you to take into consideration reclassifying the Administrative Supervisors.

<u>Him M Uttech / Him M Uttech</u> Employee Signature / Typed Name	<u>04/22/2020</u> Date
<u>Linda E Maher / Linda E Maher</u> Employee Signature / Typed Name	<u>4/22/2020</u> Date
<u>Judith Becker-Smith / Judith Becker-Smith</u> Employee Signature / Typed Name	<u>4/22/2020</u> Date

Employee: Complete and forward this form to your immediate supervisor for review and comment. Your supervisor will review your request, make comments and forward to your department head. Your department head will review your request, make comments as appropriate and then forward it to the Employee Resources Department no later than **April 30th**. Classification Review Requests must include the immediate supervisor and department head comments and signatures.

Immediate Supervisor Comments

- I agree with the employee's review request.
- I disagree with the employee's review request.

Reason/comment:

See below

Shirley Lang 4-22-2020
Immediate Supervisor Signature / Typed Name Date

Immediate Supervisor: Complete and forward this form to your Department Head. The Department Head will review this request and make changes as appropriate. Please note that all appeals must be forwarded to the department head no later than **April 30th**.

Department Head or Designee Comments

- I agree with the employee's review request.
- I disagree with the employee's review request.

Reason/comment:

These supervisory positions have become a very intricate part of how this office runs and the handling of procedures and fixing problems all from behind the scenes and with very little acknowledgment. This description of their positions only touches the majority of things they do - there is so much more they do.

Shirley Lang Shirley Lang 4-22-2020
Department Head Signature / Typed Name Date

Department Head: Complete and forward this form to the Employee Resources Department. The Employee Resources Department will review this request and make changes as appropriate. Please note that all review requests must be filed with the Employee Resources Department no later than **April 30th**.

Marathon County Position Description Questionnaire

Return Completed Form To

Employee Resources Department

1. EMPLOYEE INFORMATION: In this section you will provide information regarding your name, current job title, your immediate supervisor, etc. This information will help us make sure we refer to the correct job throughout the study.

Employee Name:	Kim Uttech, Linda Maher, Judith Becker-Smith	Date Form Completed:	April 22, 2020
Official Job Title:	Register in Probate, Court Services Supervisor, Administrative Supervisor	Department:	Clerk of Courts
Work Phone:	715-261-1261 715-261-1305 715-261-1277	Site:	Marathon County Courthouse
E-mail:	Kim.Uttech@wicourts.gov Linda.Maher@wicourts.gov Judith.Becker-Smith@wicourts.gov	Time in Current Position:	9 years 5 years 3 years <u> </u> years <u> </u> months

<u>Immediate Supervisor:</u>	<u>Immediate supervisor reports to:</u>
Name: Shirley Lang	Name: _____
Title: Clerk of Court	Title: _____
Work Phone: 715-261-1333	Work Phone: _____
E-mail: Shirley.Lang@wicourts.gov	E-mail: _____

2. POSITION SUMMARY- This is very important.

Please write 1 to 3 sentences which describe the purpose and major duties of your position.

Example: I provide administrative support to the purchasing department. My duties include answering phones, filing and retrieving documents, answering questions from vendors, entering data, and tracking documents.

We supervise the daily operations of the Circuit Courts and the Clerk of the Courts Office which entails the management, planning, directing and coordination of all activities essential to the courts' ongoing operation.



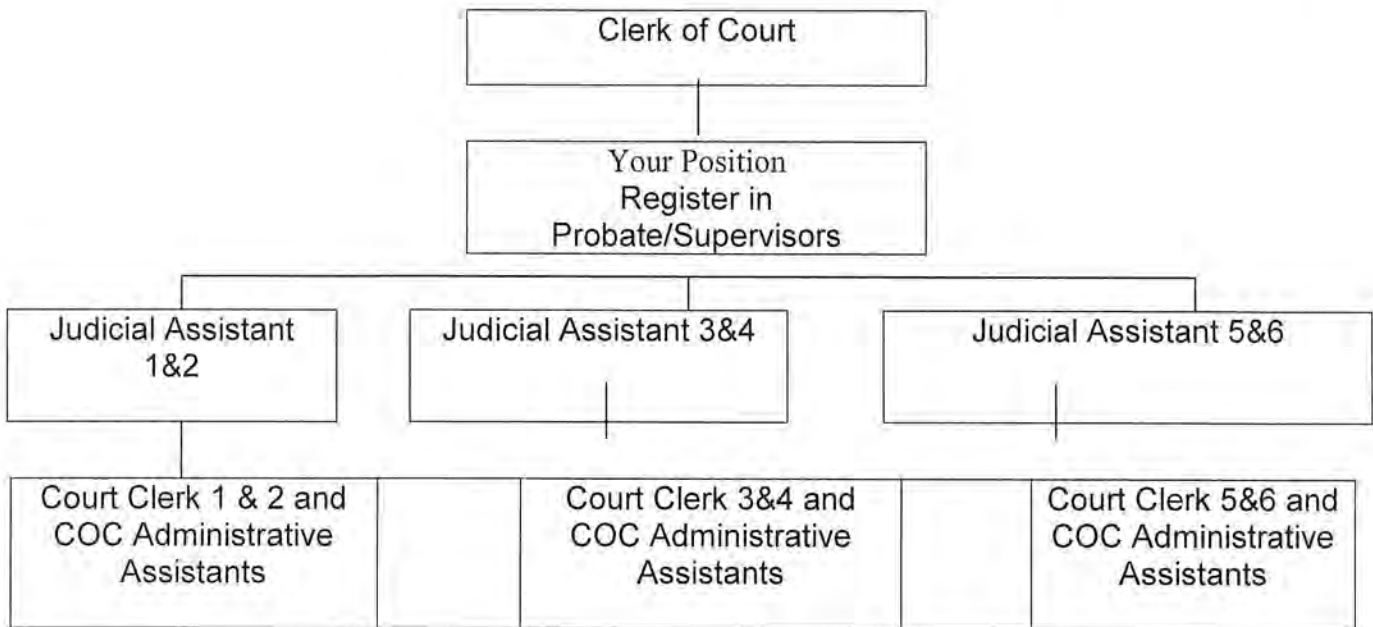
3. SUPERVISORY RESPONSIBILITIES – This is very important.

For each statement in the chart below, if the statement applies to your position, please check the box under the “Yes” column and then indicate the number of employees for which you are responsible to the right of the statement.

Yes	Duty	Full-time Equivalent Employees	Head Count
<input type="checkbox"/>	I do not officially supervise other employees (sign performance reviews).	NA	NA
<input checked="" type="checkbox"/>	I evaluate and sign performance reviews of other regular employees.	10	10
<input checked="" type="checkbox"/>	I provide work direction to and review the work of student workers, temporary and/or contract employees.	20	20

4. ORGANIZATION CHART

Complete the organization chart below. **Please use titles and not names.** List only those positions for which you sign performance evaluations.





5. ESSENTIAL DUTIES. *This is very important.*

In the table below, please list your essential duties (**those duties that make up at least 5% of your time**), and the decisions you make in carrying out each duty. Provide enough detail so that someone who may not be familiar with your job will have a clear understanding of what it is that you do. For example, do not simply state “prepares reports”, but state “prepares reports such as status reports, staff reports”, or other type of report(s) you may prepare. Also, please use action verbs such as prepares, calculates, operates, etc., to start off each statement. Avoid phrases such as “assists with” or “participates in.” **Do not use acronyms.**

In the Frequency column, please indicate how often you perform each duty: D = daily, W = weekly, M = monthly, Q = quarterly, A = annually, or O = occasionally.

In the “Percent of Time” column please indicate how much of your time you spend on each task. The total of these percentages **should not be more than 100%**. Example: Sally conducts property value estimates 20% of the time, it may mean she spends one day out of five on that task, or that she spends around two hours each day. These need only be estimates so do not spend a great deal of time trying to come up with an exact percentage. The percentages of your essential duties should not exceed 100%, but should account for at least 80% of your time.

Essential Duties (What you do and how you do it.)	Decisions Required	Frequency: D = Daily W = Weekly M = Monthly Q = Quarterly A = Annually O = Occasionally	% of Time
EXAMPLES: (List actual essential duties below examples)			
<i>Prepares monthly newsletters by gathering information, writing copy, editing, and preparing for publication.</i>	<i>Articles to include, editorial changes, graphics, layouts</i>	M	25%
<i>Performs inventory spot checks and monthly counts of supplies in warehouse.</i>	<i>When to check supplies</i>	M	10%
1. SEE ATTACHED		Select	
2.		Select	
3.		Select	
4.		Select	
5.		Select	
6.		Select	
7.		Select	
8.		Select	
9.		Select	
10.		Select	
11. Other duties as assigned.		Select	

Attach additional sheets if necessary.

6. REQUIRED KNOWLEDGE AND SKILLS Please list the knowledge and skills required for entry into your position, and not what you might necessarily know or be able to do after being in your position for a number of years. **Knowledge:** refers to the possession of concepts and information gained through experience, training and/or education and can be measured through testing. **Skills:** refers to proficiencies which can be demonstrated and are typically manual in nature and/or can be measured through testing.

Knowledge & Skills
1. Leadership and Supervisor skills
2. Legal procedures in most or all case types
3. Legal Terminology
4. Understanding of Court Operations
5. Word Processing and working with a PC
6.
7.
8.
9.
10.



7. EDUCATION - *This is very important.* Identify the minimum level of education you believe is needed to satisfactorily perform your job **at entry into your position**. This may be different from what the organization currently requires and/or from your own level of education.

**Position
Requires:**

- Less than High School Diploma or equivalent (G.E.D.) (ability to read, write, and follow directions)
- High School Diploma or equivalent (G.E.D.)
- Up to one year of specialized or technical training beyond high school
- Associate degree (A.S., A.A.) or two-year technical certificate
- Bachelor's degree in _____
- Master's degree in _____
- Other (explain): _____

What field(s) should training or degree be in?

Legal related field, Paralegal, Criminal Justice



8. EXPERIENCE - *This is very important.*

Identify the minimum type and years of experience required for **entry into your position?**

	Minimum Time Required	
Legal emphasis with supervisory or leadership experience or training	5	years
_____		years
_____		years

9. SPECIAL REQUIREMENTS:

List any registrations, certifications or licenses that are required for **entry into your position.**

Do not use acronyms.

None at this time

10. MACHINES, TOOLS AND EQUIPMENT. List any specialized machines, tools, equipment or software used in your work and show the time spent using each. Do not list common office equipment and software such as Microsoft Office, e-mail applications, copiers, faxes, personal computers, etc.

Machines, Tools, Equipment	Time Infrequently <10% Seldom 10-25% Moderately 25-50% Frequently >50%
Consolidated Court Automation Program (CCAP)	Frequently > 50%
Video and Audio Equipment for court record and hearing purposes. Such as CART Video, FTR, ELMO Projection device, phone conferencing	Moderately 25% - 50%
	Select
	Select
	Select
	Select

11. DECISION-MAKING & JUDGMENTS.

a. Describe two decisions and/or judgments you make regularly and independently in the performance of your duties.

1. We supervise and manage a staff of 20 employees with an emphasis on assigned division staff. We monitor workflow and distribute work product among employees to ensure timely processing. Over 500 documents are e-filed each day that require 24 hour processing and over 300 paper filings must be docketed, scanned, submitted to the judge for review and processed within three days. At the same time, We investigate and address telephonic and in person customer complaints and their complex issues and how they pertain to statutory procedures. This demands our understanding of over 24 case categories and applying Wisconsin Statutes in making procedural decisions. In addition, we assume responsibility for developing and implementing office procedures for division and support staff.

2. We clarify procedure and explain necessary paperwork to other Marathon County departments, counties, states, attorneys and to pro se filers. We inform, advise and educate the judicial assistants and judges regarding e-filing, electronic records and procedures. We must analyze the daily changes to CCAP and the e-filing platform to keep up to date. We work through and trouble shoot the issues judicial assistants, judges, attorneys and the general public are encountering with the e-filing program and contact the CCAP support line to fix issues our county is experiencing.

Since the implementation of e-filing many of our processes and procedures are constructed and changed daily.

b. When making decisions do you most often (Check only one):

- Routinely check with your supervisor before doing anything other than following standard procedures.
- Follow standard procedures and established practices to resolve problems using limited discretion.
- Use some discretion in your daily work and recommend new or revised policies, procedures and standard practices, which may be implemented after being approved by your supervisor.
- Create and implement new solutions not previously applied.

c. Indicate which of the following types of decisions you make regularly in the course of your work.

<input checked="" type="checkbox"/>	I plan and schedule the work of others.
<input checked="" type="checkbox"/>	I set goals and objectives for others.
<input checked="" type="checkbox"/>	I provide training and instruction to others.
<input checked="" type="checkbox"/>	I assign work activities to others.
<input checked="" type="checkbox"/>	I establish standard procedures.
<input checked="" type="checkbox"/>	I make hiring and promotion decisions.
<input checked="" type="checkbox"/>	I provide discipline and performance counseling.
<input checked="" type="checkbox"/>	I provide advice to peers that they must consider carefully before making a decision.
<input checked="" type="checkbox"/>	I provide information to supervisors/management that they use in making a decision.

12. PHYSICAL FACTORS - Your answers in this section will not affect how your job is classified.

Check the box that best describes the overall amount of physical effort required to perform your job.

- Sedentary Work:** Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
- Light Work:** Exerting up to 20 pounds of force occasionally, and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for Sedentary Work and the worker sits most of the time, the job is rated for Light Work.
- Medium Work:** Exerting up to 50 pounds of force occasionally, and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
- Heavy Work:** Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
- Very Heavy Work:** Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

For each physical activity listed below, indicate the amount of time you spend performing each physical activity during the course of your work, and the level of importance of each physical activity to the performance of your essential duties.

Physical Activity	Frequency	Importance
Climbing: Ascending or descending ladders, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized.	Infrequently <10%	1--Somewhat Important
Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces.	Infrequently <10%	1--Somewhat Important
Stooping: Bending body downward and forward by bending spine at the waist.	Moderately 25% - 50%	1--Somewhat Important
Kneeling: Bending legs at knee to come to a rest on knee or knees.	Moderately 25% - 50%	1--Somewhat Important
Crouching: Bending the body downward and forward by bending leg and spine.	Infrequently <10%	0--Not Important
Crawling: Moving about on hands and knees or hands and feet.	Never	0--Not Important
Reaching: Extending hand(s) and arm(s) in any direction.	Moderately 25% - 50%	2--Very Important
Standing: Particularly for sustained periods of time.	Seldom 10% - 25%	1--Somewhat Important
Walking: Moving about on foot to accomplish tasks, particularly for long distances.	Moderately 25% - 50%	1--Somewhat Important
Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.	Seldom 10% - 25%	1--Somewhat Important
Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.	Seldom 10% - 25%	1--Somewhat Important
Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position.	Seldom 10% - 25%	1--Somewhat Important
Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling.	Frequently > 50%	3--Extremely Important

Grasping: Applying pressure to an object with the fingers or palm.	Frequently > 50%	3--Extremely Important
Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching the skin, particularly that of fingertips.	Frequently > 50%	3--Extremely Important
Talking: Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.	Frequently > 50%	3--Extremely Important
Hearing: Ability to receive detailed information through oral communication, and to make fine discriminations in sound, such as when making fine adjustments on machined parts.	Frequently > 50%	3--Extremely Important
Seeing: The ability to perceive the nature of objects by the eye.	Frequently > 50%	3--Extremely Important
Repetitive Motions: Substantial repetitive movements (motions) of the wrists, hands, and/or fingers.	Frequently > 50%	3--Extremely Important

13. WORKING CONDITIONS - Your answers in this section will not affect how your job is classified.

Check the box next to each working condition that you are subject to during the course of your work, and indicate the amount of time you are subject to that condition. **If most of your work is in an office setting, you may select the “Does Not Apply” box below.**

Does Not Apply

	Condition	Time
<input type="checkbox"/>	Hazardous physical conditions (mechanical parts, electrical currents, vibration, etc.)	Select
<input type="checkbox"/>	Atmospheric Conditions (fumes, odors, dusts, gases, poor ventilation)	Select
<input type="checkbox"/>	Hazardous materials (chemicals, blood and other body fluids, etc.)	Select
<input type="checkbox"/>	Extreme temperatures	Select
<input type="checkbox"/>	Inadequate lighting	Select
<input checked="" type="checkbox"/>	Work space restricts movement	Frequently > 50%
<input type="checkbox"/>	Intense noise	Select
<input type="checkbox"/>	Travel	Select
<input checked="" type="checkbox"/>	Environmental (disruptive people, imminent danger, threatening environment)	Frequently > 50%

14. ADDITIONAL COMMENTS

Are there any additional comments you would like to make to be sure you have described your job adequately?

We feel the description in Appendix A of the Classification Review Request and the Position Description Questionnaire adequately describes our positions. However, we would like you to take note, that even though we are in the same classification, we have three slightly different supervisory roles. Essentially we have the same function which supersedes our current classification and payroll system pay levels. We are responsible to know each others roles, expected to fill each others positions when one of us is out of the office, be available to all employees to respond to issues that arise and collaborate with each other when completing annual reviews.

EMPLOYEE CERTIFICATION

I certify that the above statements and responses are accurate and complete to the best of my knowledge.
Digital Signatures are acceptable.

Signed:	<u>Jim M Uttech</u>	Date:	<u>04/22/2020</u>
	<u>Jim E Maher</u>		<u>4/22/2020</u>
	<u>Janet Burns Smith</u>		<u>4/22/2020</u>

THANK YOU FOR COMPLETING THIS QUESTIONNAIRE. AFTER YOU OR YOUR GROUP HAVE COMPLETED YOUR PORTION OF THE QUESTIONNAIRE, PLEASE SUBMIT THE QUESTIONNAIRE TO YOUR SUPERVISOR FOR REVIEW, SIGNATURE, AND COMMENT. YOUR SUPERVISOR WILL THEN SUBMIT THE COMPLETED QUESTIONNAIRE TO HIS/HER DEPARTMENT HEAD.

TO BE COMPLETED BY SUPERVISOR

Use this section to note any additional comments, additional duties or disagreements with any section of the questionnaire. Do not change anything written by the individual filling out the questionnaire and do not address any performance issues. If you disagree with any information provided or believe some information is missing, indicate below the question number and your comments.

Question No.	Comments

Any supervisory comments must be discussed with the employee.

SUPERVISORY SIGNATURES (Digital signatures are acceptable)

Please check the appropriate statement:

- I agree with the incumbent's position questionnaire as written.
- The above modifications have been discussed with the incumbent, and the incumbent agrees with these modifications.
- The above modifications have been discussed with the incumbent, and the incumbent disagrees with these modifications.

Supervisor Signature: _____ Date: _____

Department Head Signature: Shirley Lang Date: 4-22-2020

I have noted the modifications made by my supervisor in the comments section above.

Employee Signature: Huri M Uttech Date: 04/22/2020
Leopold E Macher 4/22/2020
Janeth B. Smith 4/22/2020

Essential Duties and Decisions Required	Frequency: D=Daily W=Weekly M=Monthly Q=Quarterly A=Annually O=Occasionally	% of Time
<ul style="list-style-type: none"> • Supervise all staff with emphasis on assigned division staff. • Back up supervisory duties in the civil division, criminal division, appeals division, records division, court clerk and probate department. • Maintain time cards, vacation requests and coverage. • Organize and direct operations and provide coaching, feedback and support in developing others. • Regularly check and review employee work product. • Monitor daily work flow and distribute work among employees to ensure timely processing. • Make decisions within established guidelines and assume responsibility for developing and implementing office procedures for division and support staff. • Work with Attorneys, DA, Probation, Child Support, Social Services and pro se filers daily to advise them on procedures and facilitate e-filing usage in addition to educate users. • Inform, advise and educate Judicial Assistants and Judges about e-filing, electronic record, procedures and processing. • Work out and trouble-shoot the issues Judicial Assistants and Judges are encountering with case management, e-filing, electronic records and with pro se filers and attorneys. • Handle case management, which only the supervisors have authority and access to. • Regularly provide basic coverage for Judicial Assistants when an attorney or pro se individual requires immediate assistance. • Implement new procedures to accommodate e-filing that changes daily. • Receipting fees that have been mailed, paid by in-person customers, Department of Corrections, Accounting and managing accounts. • Daily review and accounting of civil judgment requests from Probation and Parole. Modify accounts to reflect 	D	50%

Department of Corrections records and enter new civil judgments. Correct many errors from the previous administration and report those corrections to the Department of Corrections.

- Daily access of Department of Corrections WICS to verify DOC appropriately entered amounts to be collected based upon our assessment reports.
- Daily review of pending Appeals; prepare and submit required documents within strict statutory time frames. Prepare circuit court filed by locating all documents (including those that could be missing). Create an electronic record of the file and properly identify each event. Create an Appeal Record Index and submit to the Court of Appeals.
- Draft letters and memos to individuals, if necessary, to give them information they are seeking, create reports and correspondence, process incoming mail.
- Answer phone calls and direct parties to proper department, agency or attorney. Advise them of procedures to follow or where they can seek information they are looking for.
- Monitor daily e-mails from Probation and Parole to ensure requests are being responded to within 24 hours.
- Close cases and generate the Judgment of Conviction.
- Transition old case files to electronic and destruction of files.
- Contact attorneys, schedule hearings, send out notices for guardianship protective placement review (WATTS) hearings.
- Maintain calendar and follow-up with attorneys, departments, pro se filers and State regarding case filings and following statutes.
- Sign orders as Probate Commissioner, including Notices of Hearings, Orders Appointing Guardian ad Litem, Orders Continuing Protective Placement, Order for Payment and Fees.
- Schedule hearings and send out notices for appropriate hearings with Judge to keep cases moving.
- Send out notices to attorneys and pro se parties regarding issues complying with statutes for cases.
- Maintain probate caseload and responsible for informal probate cases filed in Marathon County from start to finish.

<ul style="list-style-type: none"> • Review and oversee over 1,000 accountings returned to Probate office to make sure guardians comply and have not used funds inappropriately; review inventories and final accountings. • Draft forms to help pro se parties with checklists and filing of documents. • Schedule appointments for individuals to come in to file paperwork to start actions in the probate office. • Sign legal documents as Probate Court Commissioner or Register in Probate ordering continuing protective placement, protective services, signing notice of hearings, order appointing guardian ad litem, domiciliary letters giving authority to personal representatives, trust letters and Notice to State Elections Board. • Ability to perform complex work that requires a high degree of accuracy and provide back up and daily assistance to staff in the following areas, but not limited to: appeals, civil, restraining orders, warrants, small claims, interpreter requests and cancellations, family, juvenile CHIPS, JIPS and delinquency cases, switchboard/calls, scanning, routing and quality control, records, criminal, traffic, collections, informal and formal probate, 51.15 mental commitments, juvenile guardianships, adult guardianships and protective placements, juvenile and adult adoptions, termination of parental rights, will for safekeeping and non-probate of wills. 		
<ul style="list-style-type: none"> • Investigate customer complaints and determine appropriate resolution. Handle difficult and angry customers in person and on telephone. • Maintain current records by checking reports and status of cases. • Work closely with the Department of Transportation to ensure Conviction Status Reports are transmitted accurately. • Work closely with all law enforcement agencies in county and municipal courts. • Prepare and submit Financial Request Forms to return bond money if not applied to costs. • Ensure restitution orders are being filed and updated. • Answer questions from the Marathon County public email located on the website. 	W	20%

<ul style="list-style-type: none"> • Regularly assist at front windows for customer support especially during small claims hearings generating Writs and collecting docketing fees, Traffic Court and Criminal Initial Appearances and generating bonds. • Generate Notices of Hearings for Juvenile and traffic cases. • Handle collections of court costs through tax intercept. Identify monies being held, which case to apply payment to, receipt and generate reports. Maintain record of payments. • Preside as Probate Court Commissioner of WATTS review hearings held on the record and make findings and determinations regarding protective placement for adults. • Court clerk WATTS review hearings. • Process court documents from WATTS review hearings and distribute copies to parties, agencies and facilities. • Member in good standing with the Wisconsin Register in Probate Association; work with other registrars. • Send paperwork to State of Wisconsin to amend or create a new birth certificate or to forward paperwork to the Adoption Records Search program. • Send paperwork to the State Elections Board when voting rights have been removed or reinstated. 		
<ul style="list-style-type: none"> • Hold and attend management meetings. • Participate in planning long range goals for staff and the department and implementing these plans. • Continuously gain knowledge of the specific operations of the Clerk of Courts Department as they relate to office procedures necessary to accomplish the department's objectives. • Keep abreast of new laws, statutes, forms, and procedures to comply with model recordkeeping and implement procedures for new statutes/laws. • Research case law for judges and advise them of procedures that need to be followed and discrepancies with cases filed • Inform employees of changes occurring within County Administration. • Clearly and accurately transmit information from both the general public to department staff members and from the department to the client/public served by the department. 	M	10%

- Work with CCAP for problem-solving technical malfunctions, fielding questions by pro se customers & attorneys.
- Assist staff and judicial staff with CCAP or other issues.
- Develop and promote Employee Recognition Program and Culture.
- Serve on a variety of county committees facilitating and implementing programming such as Culture Champion, Judicial Engagement (JET), Way Finding Committee, Mediation Work Group, and District Attorney, Probation Department, Clerk of Court Work Group.
- Participate in monthly meetings with the District Attorney and Probation and Parole to ensure we're all working cohesively between our departments.
- Keep current on all training offered through county administration such as Leadership Development, Ideas Academy and Inclusivity training.
- Maintain and schedule usage calendar for Room B226, conference rooms and jury rooms.
- Maintain Court Reporter Notes and reaching out to all court reporters to submit record each month including substitute reporters located out of the area. Submit necessary documents to the District 9 Court Administrator's office.
- TIME training, Compliance, Audit. TAC administrator for Criminal Investigations Bureau (CIB) to access TIME. Responsible for all authorized and unauthorized users in the Clerk of Courts Office. Ensure certifications of staff users, maintain user's expirations dates and compliance. Responsible for audit with CIB.
- Maintain and update all forms.
- Enter over 100 judgments weekly, print and mail out the Notices of Entry of Judgment and Order for Financial Disclosure following small claims hearings. As well as assist the civil division in entering judgment all within strict statutory time frames of 24 hour processing.
- Maintain files for Supplemental Court Commissioners, Marathon County Sheriff's Department Oaths and Marathon County Court Rules.
- Assist as clerk for small claims hearings or clerk all hearings as a back-up to the court clerks; enter minutes according to model record keeping.

<ul style="list-style-type: none"> • Create lists for Adult Protective Services regarding reports that need to be completed for protective placement cases per statute. • Work with the Department of Justice regarding filing of fire arm restrictions. 		
<ul style="list-style-type: none"> • Round with employees quarterly. • Conduct staff meetings. • Train new staff and continue training current staff for cross-training purposes and introducing new procedures and processing. • Work with District 9 Court Administrator to facilitate training and compliance. • Back-up to Accounting Specialist with daily balancing of drawers and deposits. 	Q	10%
<ul style="list-style-type: none"> • Complete employee reviews and hold meetings with employees to discuss evaluations and goal setting. • Attend all divisional seminar and training opportunities and share information and training points with the department. • Create and distribute annual traffic court calendar for staff and law enforcement agencies. The calendar enables officers to enter court dates and times when issuing citations. • Prepare over 1,000 accountings and reports for guardians to complete per statute and send out. • Prepare report to the Chief Judge of District 9 regarding protective placement reviews and the status of timely filing of reports. • Give PowerPoint presentations to groups and meet with groups regarding probate office cases. 	A	5%
<ul style="list-style-type: none"> • Interview prospective employees for employment. • Handle issues that arise between employee dynamics. Provide direction/discipline to employees when necessary and follow up. • Maintain CCAP user securities for employees. • Maintain CCAP e-filing calendar for recognized filing dates and Courthouse closures. • Appear in court and represent Marathon County Probate office at hearings before Judge and advise Judge of issues that have arisen in cases and what needs to be addressed. • Update and maintain Electronic Civil Procedures Manual on the shared drive (M:/drive). 	O	5%

<ul style="list-style-type: none">• Establish payment plans in criminal cases.• Collect bond money and complete tax form if over \$10,000.00 so we comply with the IRS.• Maintain work areas for safety and contact Facilities and Capital Management for building and office needs.• Maintain photocopiers and contact office repair business for needed work.• Maintain and update the Clerk of Courts website including adding hyperlinks.• Maintain and update the designated pro se filer Information wall.• Work with District Attorney's office and Sheriff's Department when someone misappropriates funds and charges are filed.• Testify in court if necessary when party is charged with misappropriation of funds.		
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2021 POSITION RECLASSIFICATION REPORT

Department: Clerk of Courts
Current Classification and DBM: Administrative Specialist (B21)

Requested Classification (DBM): Administrative Coordinator (B23)
Incumbents: Wendy McCarthy, Deputy Register in Probate

Employee Resources
Recommendation: **Reclassify to Criminal Justice Specialist with DBM B22.**

Summary: The Register of Probate office functions under the direction of the Clerk of Court. There are two individuals working in this office and their work is conducted with a high level of independence. The Register of Probate and the Deputy Register of Probate are responsible to provide a high level of confidential services requiring independent decision making. The Deputy Register in Probate provides a variety of advanced level support to the Register of Probate, Circuit Court Judges, Attorneys and the public. The Deputy Register of Probate is currently classified as an Administrative Specialist, B21. In the absence of the Register of Probate, B31, the Deputy has the authority to make decisions and sign orders on behalf of the Register in Probate.

The specialist in this department must be able to handle a wide variety of diverse cases. In addition to informal and formal probate, the office handles mental and alcohol commitments, adult and child adoptions, and termination of juvenile and adult guardianships or parental rights. The complexity of tasks and the diversity of cases handled daily supports consideration of a reclassification for this position compared to similar Administrative Specialist positions in this department and in the county system.

Final Recommendation: After reviewing the classification structure, and applying the Decision Band Method of Job Evaluation, it has been determined that this Administrative Specialist position performs responsibilities that are more specialized in the Register of Probate office where independent decision making, diverse tasks and problem solving is required daily. Due to a higher level of variety in the tasks, more complexity, and decision making, it is our recommendation to reclassify the Administrative Specialist in the Register of Probate Office to the classification of Criminal Justice Specialist with a DBM rating of B22. This recommendation better aligns responsibilities within the Clerk of Courts Office, as well as within the county's classification system.

Employee Resources supports increase in hourly rate from \$18.95 to \$19.50 effective 1/10/2021.

2021 Fiscal Impact: \$1,310

Submitted by: Sue Fox & Boly Vang

Reclassification/Pay Grade Adjustment

Clerk of Courts Office - Administrative Specialist B21 - Deputy Register in Probate
Proposed to Criminal Justice Specialist B22

1 Full time Employee 100.00%
Annual Hours 2080

Current DBM

Item	Projected 2021 Rates	Minimum	Mid-Point	Maximum
		\$16.16	\$18.99	\$22.47
DBM B21 - Wages		\$33,613	\$39,499	\$46,738
FICA Retirement	6.20%	\$2,084	\$2,449	\$2,898
FICA Medicare Rate	1.45%	\$487	\$573	\$678
Unemployment Insurance	0.10%	\$34	\$39	\$47
Retirement - Employer	6.75%	\$2,269	\$2,666	\$3,155
Worker's Comp - Clerical	0.08%	\$27	\$32	\$37
Estimated Cost		\$38,514	\$45,258	\$53,553

Proposed DBM and Wage Increase to Hourly Rate Effective pay period 1/10/2021

Item	Projected 2021 Rates	Minimum	Mid-Point	Maximum
		\$17.66	\$20.75	\$24.55
DBM B22 - Wages		\$36,733	\$43,160	\$51,064
FICA Retirement	6.20%	\$2,277	\$2,676	\$3,166
FICA Medicare Rate	1.45%	\$533	\$626	\$740
Unemployment Insurance	0.10%	\$37	\$43	\$51
Retirement - Employer	6.75%	\$2,479	\$2,913	\$3,447
Worker's Comp - Clerical	0.08%	\$29	\$35	\$41
Estimated Cost		\$42,088	\$49,453	\$58,509
Cost to Reclass from B21 to B22:		\$3,574	\$4,195	\$4,956

One Employee in ths position:	Current Rate	Requested Rate	2021 Budget Impact
	From DBM B21	To DBM B22	
Wendy McCarthy	\$18.95	\$19.50	\$1,310
Fiscal Impact			\$1,310

RECEIVED
APR 27 2020

APPENDIX A
Classification Review Request - Updated 3/25/15

Employee Resources Department accepts request for classification review during the month of April - April 1st through April 30th.

MARATHON COUNTY
EMPLOYEE RESOURCES DEPT

Your Name: Wendy McCarthy

Your Supervisor's Name Kim Uttech

Your Division: Probate

Your Department: Clerk of Courts

Your Current Classification: Administrative Specialist/Deputy Register in Probate B21

- My job has changed since I filled out my PDQ. (Attach a new or updated PDQ)
When updating the prior PDQ, make all changes in **red** on the original PDQ before submitting it to the Employee Resources Department.

Requested Classification: Confidential Administrator/Deputy Register in Probate

Please specify why you believe the requested classification is more appropriate for your position than the current classification. Relate duties you perform to the essential duties and class concept listed for the requested classification:

I believe my position based on the detailed information provided that the classification should be changed to Confidential Administrative Specialist / Deputy Register in Probate B23 Non- Exempt as the majority of cases are confidential. These cases hold the highest regard for detail, integrity and professionalism.

Also noted is that there are only two individuals assigned in the Probate Office. In the absence of the Register in Probate, the Deputy Register in Probate covers the probate office and is authorized to sign orders on behalf of the Register in Probate.

I have also attached the Job Classifications of the Deputy Register in Probate for Outagamie County and the Legal Specialist for Eau Claire County. These two job titles and job descriptions mirror my current responsibilities and duties and the pay scale / range they are receiving. The pay scale would be in line with my proposed adjustment.

Use additional sheets if necessary

<i>Wendy McCarthy</i> Wendy McCarthy	
Employee Signature / Typed Name	Date <i>4/26/2020</i>

Employee: Complete and forward this form to your immediate supervisor for review and comment. Your supervisor will review your request, make comments and forward to your department head. Your department head will review your request, make comments as appropriate and then forward it to the Employee Resources Department no later than **April 30th**. Classification Review Requests must include the immediate supervisor and department head comments and signatures.

Immediate Supervisor Comments

- I agree with the employee's review request.
 I disagree with the employee's review request.

Reason/comment:

We only have two people in the Probate office so we have to have knowledge of all case types. This position is very complex and requires a lot of knowledge and confidentiality to be able to keep the office functioning.

Kim Utters 4/27/2020
Immediate Supervisor Signature / Typed Name Date

Immediate Supervisor: Complete and forward this form to your Department Head. The Department Head will review this request and make changes as appropriate. Please note that all appeals must be forwarded to the department head no later than **April 30th**.

Department Head or Designee Comments

- I agree with the employee's review request.
 I disagree with the employee's review request.

Reason/comment: Not only does this job include probate matters it also includes mental commitments, adoptions, terminations and guardianships. These are all very detailed and confidential matters and not just anyone can handle this position.

Shirley Long 4-27-2020
Department Head Signature / Typed Name Date

Department Head: Complete and forward this form to the Employee Resources Department. The Employee Resources Department will review this request and make changes as appropriate. Please note that all review requests must be filed with the Employee Resources Department no later than **April 30th**.

Marathon County Position Description Questionnaire

Return Completed Form To

Employee Resources Department

1. EMPLOYEE INFORMATION: In this section you will provide information regarding your name, current job title, your immediate supervisor, etc. This information will help us make sure we refer to the correct job throughout the study.

Employee Name: Wendy McCarthy Date Form Completed: 04/26/2020

Official Job Title: Administrative Specialist/
Deputy Register in Probate Department: Clerk of Courts

Work Phone: (715)261-1264 Site: Courthouse
Time in Current Position: 4 years months

E-mail: wendy.mccarthy@wicourts.gov

Immediate Supervisor: Kim Uttech **Immediate supervisor reports to:** Shirley Lang

Name: Kim Uttech Name: Shirley Lang

Title: Register in Probate Title: Clerk of Courts

Work Phone: (715)261-1261 Work Phone: (715)261-1333

E-mail: kim.uttech@wicourts.gov E-mail: shirley.lang@wicourts.gov

2. POSITION SUMMARY- This is very important.

Please write 1 to 3 sentences which describe the purpose and major duties of your position.

Example: I provide administrative support to the purchasing department. My duties include answering phones, filing and retrieving documents, answering questions from vendors, entering data, and tracking documents.

The Deputy Register in Probate provides a variety of advanced level support to the Register in Probate, Circuit Court Judges, Attorneys and the public. The Deputy Register, along with the Register in Probate is responsible for the processing and keeping of all juvenile and adult guardianships, mental and alcohol commitments, informal and formal probates, adult and child adoptions and termination of parental rights.



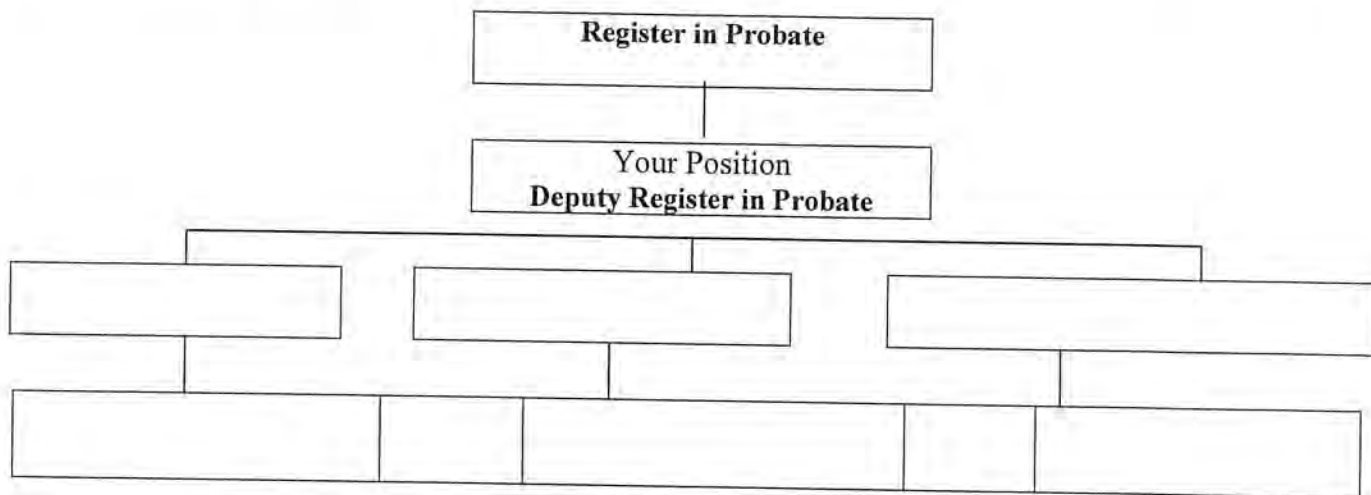
3. SUPERVISORY RESPONSIBILITIES – This is very important.

For each statement in the chart below, if the statement applies to your position, please check the box under the “Yes” column and then indicate the number of employees for which you are responsible to the right of the statement.

Yes	Duty	Full-time Equivalent Employees	Head Count
<input checked="" type="checkbox"/>	I do not officially supervise other employees (sign performance reviews).	NA	NA
<input type="checkbox"/>	I evaluate and sign performance reviews of other regular employees.		
<input type="checkbox"/>	I provide work direction to and review the work of student workers, temporary and/or contract employees.		

4. ORGANIZATION CHART

Complete the organization chart below. **Please use titles and not names.** List only those positions for which you sign performance evaluations.





5. ESSENTIAL DUTIES. *This is very important.*

In the table below, please list your essential duties (**those duties that make up at least 5% of your time**), and the decisions you make in carrying out each duty. Provide enough detail so that someone who may not be familiar with your job will have a clear understanding of what it is that you do. For example, do not simply state “prepares reports”, but state “prepares reports such as status reports, staff reports”, or other type of report(s) you may prepare. Also, please use action verbs such as prepares, calculates, operates, etc., to start off each statement. Avoid phrases such as “assists with” or “participates in.” **Do not use acronyms.**

In the Frequency column, please indicate how often you perform each duty: D = daily, W = weekly, M = monthly, Q = quarterly, A = annually, or O = occasionally.

In the “Percent of Time” column please indicate how much of your time you spend on each task. The total of these percentages **should not be more than 100%**. Example: Sally conducts property value estimates 20% of the time, it may mean she spends one day out of five on that task, or that she spends around two hours each day. These need only be estimates so do not spend a great deal of time trying to come up with an exact percentage. The percentages of your essential duties should not exceed 100%, but should account for at least 80% of your time.

Essential Duties (What you do and how you do it.)	Decisions Required	Frequency: D = Daily W = Weekly M = Monthly Q = Quarterly A = Annually O = Occasionally	% of Time
EXAMPLES: (List actual essential duties below examples)			
<i>Prepares monthly newsletters by gathering information, writing copy, editing, and preparing for publication.</i>	<i>Articles to include, editorial changes, graphics, layouts</i>	<i>M</i>	<i>25%</i>
<i>Performs inventory spot checks and monthly counts of supplies in warehouse.</i>	<i>When to check supplies</i>	<i>M</i>	<i>10%</i>
1. Process all Guardianships	(1) Discuss with Petitioning attorneys on available court dates, concentrating on statutory time limits (2) E-file the case from the CCAP system. Verify all interested parties are entered correctly. Confirm all attorneys have appropriate means of accessing the case. Verify and enter the correct court date(s) and time(s), paying close attention that the correct branch is assigned. Receipt and process the Guardian ad Litem (GAL) deposit using the appropriate receipt code. (3) File the GAL report. Determine if the ward is	Daily	40%

	<p>contesting the guardianship.</p> <p>(4) If contested, determine if the case is Protective Placement. Advise the Public Defender's Office and Court Officials for the need of a contested hearing.</p> <p>(5) Process the Determination Orders and the final hearing. Confirm all guardians are updated and are given a Guardianship Informational Packet to assist them in their guardian rolls. Enter firearm and voting restrictions if applicable. Enter annual accounting and condition of ward codes into CCAP according to the Determination Order.</p> <p>(6) Process the Protective Placement Order. Enter the protective placement review date and agency review dates on the Register in Probate's calendar. Send out correspondence to Adult Protective Services (APS) to update their WATTs review lists.</p> <p>(7) Provide copies of Guardian "Letters", certify them, if requested, and provide receipt for payment..Make appropriate disposition of case</p> <p>(8) Work with APS in the filing of the monthly WATTs Petitions and Summary reports that are due.</p> <p>(9) Contact the assigned GAL to each case and set hearing dates on the Register in Probate's calendar. E-file the WATTs paperwork into CCAP for the GAL to review and complete their report.</p> <p>(10) File the GAL report; if the ward is contesting, set up</p>		
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	<p>contested paperwork with Public Defender's Office, Corporation Counsel, GAL, APS and court branch assigned to case.</p> <p>(11) File annual accountings and condition of ward paperwork for all guardianships. Verify and update all addresses of parties. Calculate and verify numbers correlate on all pages. Confirm financial statements coincide with balances provided.</p> <p>(12) File and assist pro-se parties with the filing of guardianships. Answer detailed questions about the guardianship process. Provide packets and/or check lists of what paperwork is needed to file guardianships. Discuss the appropriate time to file a juvenile guardianship and adult guardianship. Schedule court dates and assign GAL's.</p> <p>(13) File the guardianship into CCAP. Notarize any forms as needed.</p> <p>(14) Process Successor Guardianships for guardianships that pass away or resign.</p> <p>(15) Maintain confidentiality of case.</p>		
<p>2. Process Mental / Alcohol Commitments</p>	<p>(1) Process mental/alcohol Emergency detentions and Three Party Petitions e-filed by Corporation Counsel. Verify names and demographics of Person In Need (PIN)</p> <p>(2) Docket all related court notices and court hearings</p> <p>(3) Review minutes of the court hearings and update upcoming hearings as necessary, paying close attention to the placement</p>	<p>Daily</p>	<p>15%</p>

	<p>of the PIN.</p> <p>(4) Set review/ case follow up on register in probate's calendar when commitment expires.</p> <p>(5) Make disposition of case</p> <p>(6) Docket and Process monthly recommitment petitions e-filed by Corporation Counsel. Enter recommitment hearings in the correct branch with correct date(s) and time(s)</p> <p>(7) Maintain confidentiality of case.</p>		
<p>3. Process Informal and Formal Probate Cases</p>	<p>(1) Review informal cases e-filed through CCAP. Verify all required documents are included. If there is a WILL filed, confirm all waivers and consents are signed and filed. If there is no WILL and no waivers, set for formal proceedings.</p> <p>(2) Docket the case and add Final Date to File Claims into case. Confirm dates of birth and dates of death coincide on all documents.</p> <p>(3) Before domiciliary letters are signed, verify original WILL has been received by the probate office.</p> <p>(4) Sign and certify domiciliary letters and provide receipt.</p> <p>(5) Review formal probates e-filed through CCAP. Determine issues that are pending, how many waivers that may be pending and set court date.</p> <p>(6) Review Special Administration petitions. Determine if the petition is for a specific purpose or for</p>	<p>Daily</p>	<p>20%</p>

	<p>all powers. If for all powers, set for a court hearing for all parties to attend. Hold Orders and Special Administration Letters for hearing date. If the petition is for a specific purpose and all waivers and consents are received, send orders and special administration letters directly to judge for signature. No hearing needed.</p>		
4. Process Adoptions	<p>(1) Process adoptions e-filed through CCAP. Assist pro-se parties with the adoption procedure. Verify all parties' information.</p> <p>(2) Determine how many children are being adopted and who will be conducting the home study evaluation of the family. Set up a court date and deposit the home study deposit.</p> <p>(3) Following the hearing, docket and certify the adoption orders. Draft letter to State Vital Records and send letter to Madison with one certified copy of adoption order along with Report of Adoption.</p> <p>(4) Close case.</p> <p>(5) Maintain confidentiality of case</p>	Daily	10%
5. Process Termination of Parental Rights	<p>(1) Review and e-file termination of parental rights (TPR) petition. Verify and confirm all information is accurate.</p> <p>(2) Add charges to the parent(s) whose rights are being terminated.</p> <p>(3) Assign attorney to be GAL for the children and deposit GAL payment.</p> <p>(4) Set court date</p>	Daily	10%

	<p>(5) Following court, docket the signed orders and draft letter to State Vital Records. Send letter along with TPR order to Madison.</p> <p>(6) Make disposition of charges and close case.</p> <p>(7) Maintain confidentiality of case.</p>		
6. Financial Forms	<p>(1) Process incoming doctor and attorney invoices</p> <p>(2) Confirm dates of doctor reports and testimony dates with court record.</p> <p>(3) Confirm GAL deposits of attorneys appointed to case.</p> <p>(4) Request judge approval</p> <p>(5) Docket Court Order for Payment of Fees</p>	Daily	5%
7. Cover Probate Office in Register in Probate's Absence	<p>(1) Work the probate office in the absence of the Register in Probate due to meetings, vacation and/or sickness. There are only two people assigned to the Probate office</p> <p>(2) The Deputy Register in Probate is authorized to sign orders on behalf of the Register in Probate.</p>	Select	
8. Other Duties as Assigned	<p>(1) Handle public, attorneys, judges, etc at the probate counter with various questions throughout the day.</p> <p>(2) Direct litigants to different areas of the court house for court, documents and/or information.</p> <p>(3) Print and charge for documents of court cases handled in probate</p> <p>(4) Open and process mail</p> <p>(5) Answer phone calls throughout the day</p>	Daily	

	(6) Notarize forms as requested (7) Review Scanned documents for accuracy and completeness		
9.		Select	
10.		Select	
11. Other duties as assigned.		Select	

Attach additional sheets if necessary.

6. REQUIRED KNOWLEDGE AND SKILLS Please list the knowledge and skills required for entry into your position, and not what you might necessarily know or be able to do after being in your position for a number of years. **Knowledge:** refers to the possession of concepts and information gained through experience, training and/or education and can be measured through testing. **Skills:** refers to proficiencies which can be demonstrated and are typically manual in nature and/or can be measured through testing.

Knowledge & Skills
1. Knowledge of Legal Terminology, judicial system and court rules
2. Ability to use a computer and adapt to upgrading computer applications
3. Ability to use a calculator and complete accounting / math details
4. Ability to work as a team
5. Ability to perform complex work with a high degree of accuracy and detail
6. Ability to effectively communicate complex information to the public, court officials and staff
7. Establish and maintain a professional and positive working environment with colleagues, attorneys and the public.
8. Ability to assume responsibility of office operations and procedures with confidence in the absence of a supervisor
9. Ability to work under pressure
10. Ability to maintain confidentiality



7. EDUCATION - This is very important. Identify the minimum level of education you believe is needed to satisfactorily perform your job **at entry into your position**. This may be different from what the organization currently requires and/or from your own level of education.

Position

Requires:

- Less than High School Diploma or equivalent (G.E.D.) (ability to read, write, and follow directions)
- High School Diploma or equivalent (G.E.D.)
- Up to one year of specialized or technical training beyond high school
- Associate degree (A.S., A.A.) or two-year technical certificate
- Bachelor's degree in _____

- Master's degree in _____

Other (explain): _____

What field(s) should training or degree be in?

Legal and Administrative

8. EXPERIENCE - *This is very important.*

Identify the minimum type and years of experience required for **entry into your position?**

	Minimum Time Required	
Legal	2	years
Administrative	2	years
Probate	1	years

9. SPECIAL REQUIREMENTS:

List any registrations, certifications or licenses that are required for **entry into your position.**

Do not use acronyms.

10. MACHINES, TOOLS AND EQUIPMENT. List any specialized machines, tools, equipment or software used in your work and show the time spent using each. Do not list common office equipment and software such as Microsoft Office, e-mail applications, copiers, faxes, personal computers, etc.

Machines, Tools, Equipment	Time Infrequently <10% Seldom 10-25% Moderately 25-50% Frequently >50%
Consolidated Court Automated Program (CCAP)	Frequently > 50%
	Select
	Select
	Select
	Select
	Select

11. DECISION-MAKING & JUDGMENTS.

a. Describe two decisions and/or judgments you make regularly and independently in the performance of your duties.

1. I effectively, on a regular basis, process all cases in the probate office into CCAP.

2. I thoroughly communicate the guidelines, duties and activities of the various procedures involved in all cases of the probate office.

b. When making decisions do you most often (Check only one):

Routinely check with your supervisor before doing anything other than following standard procedures.

Follow standard procedures and established practices to resolve problems using limited discretion.

Use some discretion in your daily work and recommend new or revised policies, procedures and standard practices, which may be implemented after being approved by your supervisor.

Create and implement new solutions not previously applied.

c. Indicate which of the following types of decisions you make regularly in the course of your work.

<input checked="" type="checkbox"/>	I plan and schedule the work of others.
<input type="checkbox"/>	I set goals and objectives for others.
<input checked="" type="checkbox"/>	I provide training and instruction to others.
<input type="checkbox"/>	I assign work activities to others.
<input type="checkbox"/>	I establish standard procedures.
<input type="checkbox"/>	I make hiring and promotion decisions.
<input type="checkbox"/>	I provide discipline and performance counseling.
<input checked="" type="checkbox"/>	I provide advice to peers that they must consider carefully before making a decision.
<input checked="" type="checkbox"/>	I provide information to supervisors/management that they use in making a decision.

12. PHYSICAL FACTORS - Your answers in this section will not affect how your job is classified.

Check the box that best describes the overall amount of physical effort required to perform your job.

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.

Light Work: Exerting up to 20 pounds of force occasionally, and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for Sedentary Work and the worker sits most of the time, the job is rated for Light Work.

Medium Work: Exerting up to 50 pounds of force occasionally, and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.

Heavy Work: Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.

Very Heavy Work: Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

For each physical activity listed below, indicate the amount of time you spend performing each physical activity during the course of your work, and the level of importance of each physical activity to the performance of your essential duties.

Physical Activity	Frequency	Importance
Climbing: Ascending or descending ladders, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized.	Infrequently <10%	0--Not Important
Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces.	Never	0--Not Important
Stooping: Bending body downward and forward by bending spine at the waist.	Infrequently <10%	0--Not Important
Kneeling: Bending legs at knee to come to a rest on knee or knees.	Infrequently <10%	0--Not Important
Crouching: Bending the body downward and forward by bending leg and spine.	Frequently > 50%	0--Not Important
Crawling: Moving about on hands and knees or hands and feet.	Never	0--Not Important
Reaching: Extending hand(s) and arm(s) in any direction.	Seldom 10% - 25%	1--Somewhat Important
Standing: Particularly for sustained periods of time.	Infrequently <10%	0--Not Important
Walking: Moving about on foot to accomplish tasks, particularly for long distances.	Seldom 10% - 25%	1--Somewhat Important
Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.	Never	0--Not Important
Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.	Never	0--Not Important
Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position.	Infrequently <10%	1--Somewhat Important
Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling.	Seldom 10% - 25%	1--Somewhat Important
Grasping: Applying pressure to an object with the fingers or palm.	Never	0--Not Important

Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching the skin, particularly that of fingertips.	Infrequently <10%	0--Not Important
Talking: Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.	Frequently > 50%	3--Extremely Important
Hearing: Ability to receive detailed information through oral communication, and to make fine discriminations in sound, such as when making fine adjustments on machined parts.	Frequently > 50%	3--Extremely Important
Seeing: The ability to perceive the nature of objects by the eye.	Frequently > 50%	2--Very Important
Repetitive Motions: Substantial repetitive movements (motions) of the wrists, hands, and/or fingers.	Frequently > 50%	2--Very Important

13. WORKING CONDITIONS - Your answers in this section will not affect how your job is classified.

Check the box next to each working condition that you are subject to during the course of your work, and indicate the amount of time you are subject to that condition. **If most of your work is in an office setting, you may select the "Does Not Apply" box below.**

Does Not Apply

	Condition	Time
<input type="checkbox"/>	Hazardous physical conditions (mechanical parts, electrical currents, vibration, etc.)	Select
<input type="checkbox"/>	Atmospheric Conditions (fumes, odors, dusts, gases, poor ventilation)	Select
<input type="checkbox"/>	Hazardous materials (chemicals, blood and other body fluids, etc.)	Select
<input type="checkbox"/>	Extreme temperatures	Select
<input type="checkbox"/>	Inadequate lighting	Select
<input type="checkbox"/>	Work space restricts movement	Select
<input type="checkbox"/>	Intense noise	Select
<input type="checkbox"/>	Travel	Select
<input type="checkbox"/>	Environmental (disruptive people, imminent danger, threatening environment)	Select

14. ADDITIONAL COMMENTS

Are there any additional comments you would like to make to be sure you have described your job adequately?

I believe my position based on the detailed information provided that the classification should be changed to Confidential Administrative Specialist / Deputy Register in Probate (Non-Exempt) B23. Please see attached supporting documentation.

EMPLOYEE CERTIFICATION

I certify that the above statements and responses are accurate and complete to the best of my knowledge.
Digital Signatures are acceptable.

Signed: Wendy Wilburthy Date: 4/26/2020

THANK YOU FOR COMPLETING THIS QUESTIONNAIRE. AFTER YOU OR YOUR GROUP HAVE COMPLETED YOUR PORTION OF THE QUESTIONNAIRE, PLEASE SUBMIT THE QUESTIONNAIRE TO YOUR SUPERVISOR FOR REVIEW, SIGNATURE, AND COMMENT. YOUR SUPERVISOR WILL THEN SUBMIT THE COMPLETED QUESTIONNAIRE TO HIS/HER DEPARTMENT HEAD.

TO BE COMPLETED BY SUPERVISOR

Use this section to note any additional comments, additional duties or disagreements with any section of the questionnaire. Do not change anything written by the individual filling out the questionnaire and do not address any performance issues. If you disagree with any information provided or believe some information is missing, indicate below the question number and your comments.

Question No.	Comments

Any supervisory comments must be discussed with the employee.

SUPERVISORY SIGNATURES (Digital signatures are acceptable)

Please check the appropriate statement:

- I agree with the incumbent's position questionnaire as written.

- The above modifications have been discussed with the incumbent, and the incumbent agrees with these modifications.

- The above modifications have been discussed with the incumbent, and the incumbent disagrees with these modifications.

Supervisor Signature: _____ Date: _____

Department Head Signature: _____ Date: _____

I have noted the modifications made by my supervisor in the comments section above.

Employee Signature: _____ Date: _____



Deputy Register in Probate/Probate Registrar

Class Code:
1140-1

Bargaining Unit:

OUTAGAMIE COUNTY
Established Date: May 4, 2017
Revision Date: Dec 10, 2019

SALARY RANGE

\$22.21 - \$28.51 Hourly

POSITION PURPOSE:

Reporting to the Register in Probate, the Deputy Register in Probate/Probate Registrar enters and maintains computer and paper files relating to probate and other cases. Provides information and assistance to attorneys, the general public, and others regarding probate matters.

KEY RESPONSIBILITIES:

The following duties are most critical for this position. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.

- Answers telephone calls; provides information; assists attorneys, the general public, and other departments on probate, guardianship, and commitment related questions.
- Initiates and maintains court records using automated systems in accordance with statutory requirements and within recommended procedures. Certifies documents; collect fees; and issues receipts. Assists in reviewing annual accounts. Prepares Orders to Show Cause for delinquent matters as requested by the Register in Probate.
- Schedules cases on probate calendar and prepares files for hearings for Court officials.
- Supervises and prepares evaluation reviews for the Probate Assistant.

- Prepares orders appointing Guardian Ad Litem and continuing protective placement; distributes to attorneys and other parties and maintains accurate records
- Prepares various computer reports; types annual Probate budget; orders office supplies as required.
- Interviews and advises proposed personal representatives on informal probate; makes decisions regarding the admission of wills and appointment of personal representatives; signs related documents.
- Performs duties of Court Clerk in Probate, guardianship, and mental commitment hearings.

EDUCATION/CERTIFICATIONS/EXPERIENCE REQUIREMENTS:

- High school graduate with three to four years on the job training or probate experience required.
- Or, any combination of education and experience that provides equivalent knowledge, skills, and abilities.

REQUIRED OR PREFERRED SKILLS:

- Basic computer knowledge.
- Ability to assign, supervise, and review the work of others.
- Ability to perform in a highly detailed oriented manner.
- Ability to add, subtract and reconcile check registers to bank statements.
- Ability to comprehend and interpret a variety of documents including legal documents, reports, accounts and State statutes related to estates, guardianships, and commitments.
- Ability to prepare a variety of documents including Court orders, accounting reports and general correspondence, etc.
- Ability to use and interpret legal terminology.
- Ability to communicate effectively with Judges, Judicial Assistants, attorneys, social workers, and the general public verbally and in writing.

OUTAGAMIE COUNTY IS AN EQUAL OPPORTUNITY EMPLOYER. IN COMPLIANCE WITH THE AMERICANS WITH DISABILITIES ACT, THE COUNTY WILL PROVIDE REASONABLE ACCOMMODATIONS TO QUALIFIED INDIVIDUALS WITH DISABILITIES AND

ENCOURAGES BOTH PROSPECTIVE EMPLOYEES AND INCUMBENTS TO DISCUSS
POTENTIAL ACCOMMODATIONS WITH THE EMPLOYER.



EAU CLAIRE COUNTY
Established Date: Aug 25, 2015
Revision Date: Mar 1, 2018

Legal Specialist II

Class Code:
291603

Bargaining Unit: Non-Represented Employees

SALARY RANGE

\$19.40 - \$23.78 Hourly

POSITION SUMMARY:

Provides assistance to the Register in Probate/Clerk of Juvenile Court in the operation, coordination and direction of the Register in Probate/Clerk of Juvenile Court Office; deputized position acts as office and courtroom clerk providing complex administrative clerical support for the Juvenile/Probate areas.

ESSENTIAL FUNCTIONS (ILLUSTRATIVE ONLY):

- Initiates new cases, docketing, scanning and filing legal documents.
- Ensures timely notice and adherence to legal requirements for (including, but not limited to):
 - Chapter 51 mental commitments and recommitments,
 - Chapter 54 temporary guardianships;
 - Chapter 54/55 guardianship/protective placement and annual protective placement reviews,
 - Chapter 48 children's code and
 - Chapter 938 juvenile justice code.
- Ensures compliance with timeline filings of documentation and notification timelines of court hearings.
- Applies rule of WI Appellate Procedure, maintains timeliness and proper procedure flow; prepares record for transmittal.
- Maintains up to date knowledge on local court rules, relevant state and federal statutes. Judicial priorities and office policies.
- Determines timelines to ensure compliance by other departments, including, but not limited to: District Attorney's office, Corporation Counsel and Department of Human Services.
- Provides procedural information, guidance, and assistance to the Department of Human Services supervisory staff, social workers, state public defenders, local attorneys, and the general public.
- Prepares certification of documents.
 - Serve as notary public.
- Prepares documents and files, clerks courtroom hearings and trials, and provides required follow-through from court proceedings to maintain proper procedural flow.
- Reviews and interprets files to determine additional action(s) needed; prepares documents and file for next appropriate step in case management.
- Closes out electronic case files; organizes cases and documents in preparation for electronic storage.
- Sets cases up for reviews as necessary.
- Ensures the files are accurate in terms of documentation, content, and compliance with State Statutes and local Court Rules.

- Schedules court hearings based on type of paperwork filed, give proper notice to parties according to Wisconsin Statute.
- Prepare and distribute weekly court calendar.
- Researches files for genealogy requests.
- Monitors guardianship cases to ensure legal accounting and requirements are met.
- Properly records and communicates disposition of cases and financial obligations.
- Creates fee/fine/forfeiture assessments for fiscal case management.
- Operate financial software including receipting of payments, docketing of fees and void receipts.
- Receives and receipts a variety of filing fees in the amounts established by statutory fees schedules. Deposits daily. Billing and collection of attorney, guardian ad litem and attorney fees.
- Responsible to facilitate correspondence to the clients served (including DHS, state public defenders).
- Responsible for maintaining the probate calendar by preparing and mailing out appropriate correspondence to attorneys and self-represented individuals regarding notices, reminders, order to show case hearing and status letters.
- Provides a variety of clerical support services.
- Performs other related duties as assigned or directed.

WORK ENVIRONMENT:

- Work is performed in a small office setting or a courtroom and may include long period of sitting.
- Work is performed in a fast paced office setting; work activities may involve a variety of activities including: walking, standing, climbing and crouching, reaching, pulling pushing, lifting and carrying files.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Knowledge of legal terminology and processes.
- Ability to maintain confidentiality and operate within Supreme Court Rule 70.41 guideline on all aspects of work.
- Ability to plan, organize, prioritize, adjust to, and control variations in work load, and accomplish a high volume of work without direct supervision.
- Ability to perform detailed work accurately in compliance with stringent time limits with minimal direction and supervision.
- Ability to work well under stressful conditions. Ability to take initiative in making decisions, assessing situations, and solving problems.
- Ability to take quick, accurate in-court processing minutes.
- Ability to use appropriate empathy and assertiveness skills.
- Ability to communicate detailed and complex information effectively, both orally and in writing, with Judges, the legal community, fellow employees and the general public.
- Ability to understand and apply legal requirements in statutes and regulations
- Ability to understand and carry out moderately complex oral and written instructions.
- Ability to establish and maintain effective working relationships with other employees and the general public and handle sensitive interpersonal situations calmly and tactfully.
- Ability to operate standard office machines and software equipment including but not limited to: Microsoft Office, CCAP, personal computer, printer, calculator, copy machine, fax machine, scanner and telephone.
- Knowledge of basic accounting skills.
- Ability to apply applicable laws and court orders for problem resolution.
- Ability to manage multiple cases, courtrooms and clients at one time, including the ability to adjust schedules on short notice.
- Ability to work the allocated hours of the position, which may include occasional nights dependent on the Court's needs.

REQUIRED QUALIFICATIONS:

- Associate's degree in business administration, paralegal, secretarial science, or related field.
- Three (3) or more years of experience performing progressively responsible administrative support duties.
- Experience or training in each of the following areas: legal terminology and legal processes and standard office practices and procedures.
- Proficiency in personal computer use with Microsoft Office software.
- Experience or training working in a legal office setting.

LICENSES, CERTIFICATES, AND OTHER REQUIREMENTS:

- Appointment will be conditional upon the results of a criminal background check

DESIRED QUALIFICATIONS:

- Experience in a legal setting or court-related environment, or a Register in Probate, Clerk of Juvenile Court or Clerk of Courts office, preferable as a judicial court clerk.
- Post secondary coursework in secretarial, legal, business, or related curriculum
- Training or experience using the State of Wisconsin Consolidated Court Automation Program (CCAP) software. Keyboarding skills of 65 w.p.m.

2021 POSITION RECLASSIFICATION REPORT

Department: Medical Examiner
Current Classification: MEDICAL EXAMINER (C52)

Requested Classification (DBM): Medical Examiner, (D63 or D72)
Incumbent: Jessica Blahnik

Employee Resources

Recommendation: Reclassify Medical Examiner from C52 to D61

Summary: This position serves as the department head of the Medical Examiner's Office.

We have examined the essential duties of this position and have classified the position using the Decision Band Method (DBM). The evaluation shows that the Medical Examiner is responsible for operations of the Medical Examiner's Office including office administration, budget, personnel management, policy and procedure development and compliance. The office is responsible for all death investigations that fall within the jurisdiction as outlined in Wisconsin State Statute 979; which includes sudden or suspicious deaths, suicides, homicides, accidents, child deaths, etc. The office also performs preventive work in the community, education, forensic testimony and project management. The Medical Examiner supervises the Chief Deputy Medical Examiner, two Deputy Medical Examiners and several casual "subject to call" employees.

This position has seen significant changes over the last several years. Unfortunately the volume and complexity of cases seen by the Medical Examiner's Office has continued to grow. The Medical Examiner has responded and has worked to enhance the quality and response time working with various internal and external agencies. In addition to being responsible for the operational function of the department, this is a hands on position where the Medical Examiner is capable and often required to perform all duties of the office, from reporting to crime scenes, completing investigations, or providing forensic evidence/testimony.

Duties and responsibilities performed by this position are aligned with management positions and department heads including Director of Family Health and Communicable Disease, Emergency Management Director, and Solid Waste Director.

Final Recommendation: After reviewing the classification structure, and applying the Decision Band Method of Job Evaluation, it's been determined that this position performs responsibilities in line with that of other positions falling in the pay grade/DBM rating of D61. We recommend the position be reclassified to D61.

The incumbent's currently salary falls within the new salary range, at a level where no adjustment is recommended.

2021 Total Fiscal Impact: \$0

Submitted by: Sue Fox & Boly Vang

APPENDIX A
Classification Review Request - Updated 3/25/15

Employee Resources Department accepts request for classification review during the month of April – April 1st through April 30th.

Your Name: Jessica Blahnik

Your Supervisor's Name: Lance Leonhard

Your Division: Medical Examiner

Your Department: Medical Examiner's Office

Your Current Classification: C52

- My job has changed since I filled out my PDQ. (Attach a new or updated PDQ)
When updating the prior PDQ, make all changes in red on the original PDQ before submitting it to the Employee Resources Department.

Requested Classification: D63-D72 (Supervisor Recommendation – D61)

Please specify why you believe the requested classification is more appropriate for your position than the current classification. Relate duties you perform to the essential duties and class concept listed for the requested classification:

** The original PDQ was completed by my predecessor, for ease, I created a new, more accurate PDQ **

The Medical Examiner position has not been reclassified since prior to my predecessor retiring in 2013 and there have been numerous changes and advancements within the department since. After being promoted to the Medical Examiner in 2013, it became clear that the entire office needed to be restructured and brought up to standards of acceptable death investigation. I inherited an office that had no written policies or procedures, no staff training, no minimum requirements of the deputy medical examiners, no standardization, and incomplete or fully missing investigative reports. The office was understaffed and underfunded compared to similar sized counties. In addition to the disarray of the office, the caseload and complexity of cases have dramatically increased over the past few years; please review the attached statistics.

Over the past few years we have transformed the office and improved the quality of death investigation to meet national standards. One of the most significant changes was restructuring the office, which included adding an additional 2.3 FTE positions, clearly defined roles and responsibilities for all positions, and establish minimal educational requirements for the positions. We have also created a structured deputy medical examiner training program to ensure all staff members are conducting quality investigations. We expanded the on-call deputy medical examiner position to include on-call pay, hourly pay rate (compared to per case pay rate), on-call monthly requirements, a formal work schedule, created a bonus structure for retention, and clear

standards and expectations. We introduced bimonthly staff meetings and continuing education opportunities to ensure all staff members are informed of the latest advancements in death investigation and are meeting best practice guidelines. We structured the office in a way that ensures a well-trained death investigator is always available if a complex death were to occur through the back-up system.

Another advancement is the introduction of technology into our office practices. Cremation authorizations are a large component of our daily responsibilities. We have streamlined the process by having weekly scheduled body views, clear spreadsheets for decedents and billing, decedent photographs, and the ability to complete the permits electronically. We worked closely with CCIT to build a customized case management database that clearly tracks our cases, stores all of our records electronically, generates electronic forms and requests, and allows us to create customized statistics. With the new database, we were able to transform our office to mostly paperless. We introduced electronic death reporting for hospitals, hospice agencies and some nursing homes, which greatly reduced our page volume and workload. Lastly, we are involved in numerous state level initiatives and pilot programs that will continue to assist in our office process improvement measures at the local and state level. Our office also plays a key role in death review teams and prevention initiatives.

Most importantly, we have improved the quality of death investigations to meet national standards. We have established clear guidelines on which cases need an autopsy, toxicology, hematology or additional testing. In addition, we created a thorough, detailed investigative report template that contains all of the necessary information needed for a comprehensive death investigation and ensures all case reports are written consistently between staff members. We have numerous quality control measures in place to ensure the completeness of all investigative reports. We enhanced our staff member's forensic photography training to ensure everyone is taking clear, deliberate photographs of the decedent and scene.

In conclusion, over the past six years the office has completely transformed and we now meet best practice standards for death investigation. We have a great reputation with colleagues around the state and are looked at as a regional leader and resource for the surrounding counties. We have mended and enhanced all working relationships with outside agencies and organizations as well. I am proud of the advancements of the office and excited for the future growth of the office.

Use additional sheets if necessary

Jessica Blahnik

Employee Signature / Typed Name

04/27/2020

Date

Employee: Complete and forward this form to your immediate supervisor for review and comment. Your supervisor will review your request, make comments and forward to your department head. Your department head will review your request, make comments as appropriate and then forward it to the Employee Resources Department no later than **April 30th**. Classification Review Requests must include the immediate supervisor and department head comments and signatures.

Immediate Supervisor Comments

- I agree with the employee's review request. (**with modification listed above**)
- I disagree with the employee's review request.

Reason/comment:

I agree with the request to reclassify the position to the D classification, specifically, D61, for the reasons set forth in the request above. The reclassification improves the internal equity amongst the Department Head group. Most importantly, the reclassification will reflect the growth in responsibility that has taken place over the last three years. It should be noted, the reclassification will not lead to a change in compensation received by the incumbent.

Lance Leonhard	4/30/2020
Immediate Supervisor Signature / Typed Name	Date

Immediate Supervisor: Complete and forward this form to your Department Head. The Department Head will review this request and make changes as appropriate. Please note that all appeals must be forwarded to the department head no later than **April 30th**.

Department Head or Designee Comments

- I agree with the employee's review request. (**with modification listed above**)
- I disagree with the employee's review request.

Reason/comment:

I agree with the request to reclassify the position to the D classification, specifically, D61, for the reasons set forth in the request above. The reclassification improves the internal equity amongst the Department Head group. Most importantly, the reclassification will reflect the growth in responsibility that has taken place over the last three years. It should be noted, the reclassification will not lead to a change in compensation received by the incumbent.

Lance Leonhard	4/30/2020
Department Head Signature / Typed Name	Date

Department Head: Complete and forward this form to the Employee Resources Department. The Employee Resources Department will review this request and make changes as appropriate. Please note that all review requests must be filed with the Employee Resources Department no later than **April 30th**.

Marathon County Position Description Questionnaire

Return Completed Form To

Employee Resources Department

1. EMPLOYEE INFORMATION: In this section you will provide information regarding your name, current job title, your immediate supervisor, etc. This information will help us make sure we refer to the correct job throughout the study.

Employee Name: <u>Jessica Blahnik</u>	Date Form Completed: <u>04/22/2020</u>
Official Job Title: <u>Medical Examiner</u>	Department: <u>Medical Examiner</u>
Work Phone: <u>715-261-1130</u>	Site: <u>Medical Examiner's Office (1308 West Street, Wausau)</u>
E-mail: <u>Jessica.Blahnik@co.marathon.wi.us</u>	Time in Current Position: <u>6 years 8 months</u>
<u>Immediate Supervisor:</u>	<u>Immediate supervisor reports to:</u>
Name: <u>Lance Leonhard</u>	Name: _____
Title: <u>County Administrator</u>	Title: _____
Work Phone: <u>715-261-1402</u>	Work Phone: _____
E-mail: <u>Lance.Leonhard@co.marathon.wi.us</u>	E-mail: _____

2. POSITION SUMMARY- **This is very important.**

Please write 1 to 3 sentences which describe the purpose and major duties of your position.

Example: I provide administrative support to the purchasing department. My duties include answering phones, filing and retrieving documents, answering questions from vendors, entering data, and tracking documents.

As the Medical Examiner, my main role is to oversee and assist with all death investigations that fall within our jurisdiction, as outlined in Wisconsin State Statute 979; which includes sudden or suspicious deaths, suicides, homicides, accidents, child deaths, etc. I manage all operations of the Medical Examiner's Office to include office administration, budget, personnel management, policy and procedures development and maintenance, prevention work and review teams, forensic testimony, and project management. I also work closely with outside agencies (law enforcement, District Attorney's Office, funeral homes, healthcare staff) and act as a local and state resource.



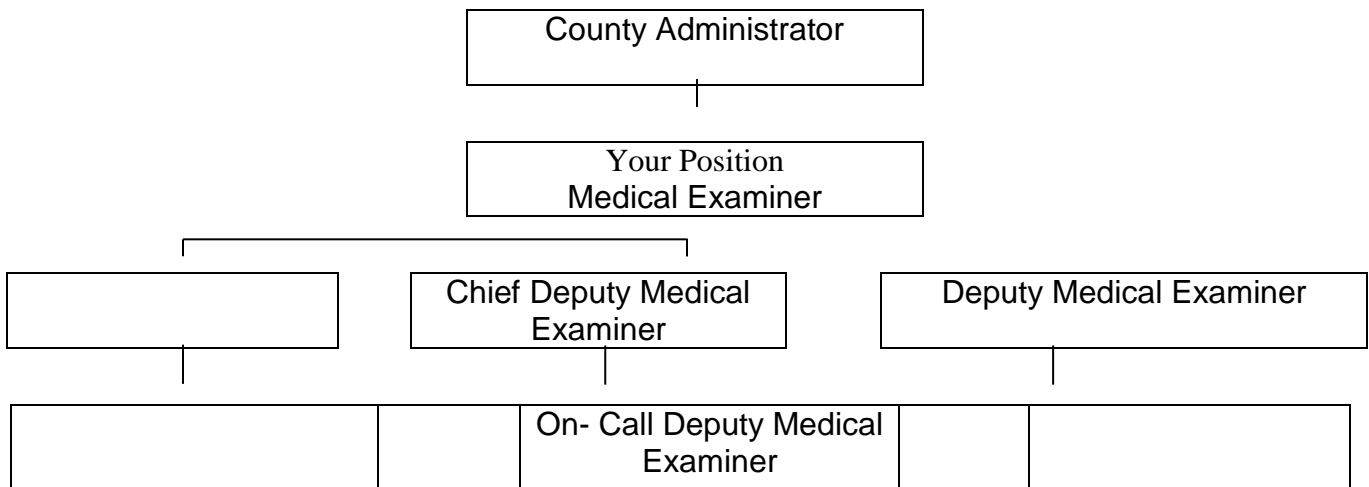
3. SUPERVISORY RESPONSIBILITIES – This is very important.

For each statement in the chart below, if the statement applies to your position, please check the box under the “Yes” column and then indicate the number of employees for which you are responsible to the right of the statement.

Yes	Duty	Full-time Equivalent Employees	Head Count
<input type="checkbox"/>	I do not officially supervise other employees (sign performance reviews).	NA	NA
<input checked="" type="checkbox"/>	I evaluate and sign performance reviews of other regular employees.	3	3
<input checked="" type="checkbox"/>	I provide work direction to and review the work of student workers, temporary and/or contract employees.	7	7

4. ORGANIZATION CHART

Complete the organization chart below. **Please use titles and not names.** List only those positions for which you sign performance evaluations.





5. ESSENTIAL DUTIES. *This is very important.*

In the table below, please list your essential duties (**those duties that make up at least 5% of your time**), and the decisions you make in carrying out each duty. Provide enough detail so that someone who may not be familiar with your job will have a clear understanding of what it is that you do. For example, do not simply state “prepares reports”, but state “prepares reports such as status reports, staff reports”, or other type of report(s) you may prepare. Also, please use action verbs such as prepares, calculates, operates, etc., to start off each statement. Avoid phrases such as “assists with” or “participates in.” **Do not use acronyms.**

In the Frequency column, please indicate how often you perform each duty: D = daily, W = weekly, M = monthly, Q = quarterly, A = annually, or O = occasionally.

In the “Percent of Time” column please indicate how much of your time you spend on each task. The total of these percentages **should not be more than 100%**. Example: Sally conducts property value estimates 20% of the time, it may mean she spends one day out of five on that task, or that she spends around two hours each day. These need only be estimates so do not spend a great deal of time trying to come up with an exact percentage. The percentages of your essential duties should not exceed 100%, but should account for at least 80% of your time.

Essential Duties (What you do and how you do it.)	Decisions Required	Frequency: D = Daily W = Weekly M = Monthly Q = Quarterly A = Annually O = Occasionally	% of Time
EXAMPLES: (List actual essential duties below examples)			
<i>Prepares monthly newsletters by gathering information, writing copy, editing, and preparing for publication.</i>	<i>Articles to include, editorial changes, graphics, layouts</i>	<i>M</i>	<i>25%</i>
<i>Performs inventory spot checks and monthly counts of supplies in warehouse.</i>	<i>When to check supplies</i>	<i>M</i>	<i>10%</i>
1. Perform death investigations and oversees all death investigations which includes: evaluating, examining, and photographing death scenes and bodies; investigating the circumstances of death by obtaining personal data and medical history; determining cause and manner of death; and documenting all observations.	Determine when additional measures (such as a forensic autopsy; toxicology, electrolytes or hematological testing; X-rays; medical record reviews; etc.) are necessary for a complete investigation and provide guidance and feedback to staff regarding their investigations. Determine cause and manner of death and provide guidance and feedback to staff	Daily	20%

	regarding their identified cause and manner of death.		
2. Office administration that includes budget management, expenditures/ordering, policy and procedure development, grant management, county projects, etc.	Determine the best way to handle issues and new circumstances, provide guidance to staff and others involved. Determine departmental priorities and ensure all resources are available.	Daily	20%
3. Project management that includes corresponding with others involved, provide frequent updates, ensure the project is on schedule, obtain all requested information, prioritize current and future project, etc.	Determine departmental needs or process improvements and find solutions to the identified need/improvement.	Weekly	10%
4. Staff management that includes staff evaluations, discipline, hiring and terminations, feedback, mentorship, guidance, etc.	Determine staff performance standards and how each staff member is meeting the standards. Determine when both positive and constructive feedback need to be provided to staff and the best method for providing that feedback.	Weekly	15%
5. Prevention work that includes coordinating the child fatality review team, coordinating the fatal overdose review team, statistical generation and maintenance, appropriate death reporting, community partnerships, high school and community presentations, etc.	Determine what information is essential to obtain while conducting death investigations that could give insight into prevention opportunities. Determine which cases to review for the death review teams.	Monthly	10%

	Determine the appropriate agency(s) to report specific deaths that meet their reporting standards.		
6. Assist with daily office operations that includes examine decedents prior to cremation, issuing cremation authorizations, requesting medical records, answering the phones, responding to emails, customer service, assisting family members, etc.	<p>Determine the current office priority and complete the task.</p> <p>Determine what records need to be obtained for a thorough death investigation.</p> <p>Determine the appropriate time a decedent may be cremated after ensuring there is no further need for investigation of the body.</p>	Daily	10%
7. Provide expert forensic testimony and case consultations to law enforcement, district attorney's office, other coroners and medical examiners, and other outside agencies.	<p>Interpret the autopsy, toxicology and investigation findings of a decedent and explain those to outside agencies.</p> <p>Provide advice and guidance to other agencies as it relates to death investigation or forensic medical findings.</p>	Monthly	5%
8. Committee involvement that includes participating in meetings, provide feedback from our office perspective, complete follow-up initiatives, etc.	Determine the appropriate/relevant information to share to assist other agencies meet their objective.	Monthly	5%
9. County and state level initiatives that includes staying current with county and state level changes/advances, work with both county and state level agencies on projects/initiatives, participate in meeting and	Determine what role our department can play to assist outside agencies as it relates to projects, initiative, or advancements.	Monthly	5%

conferences, etc.			
10.		Select	
11. Other duties as assigned.		Select	

Attach additional sheets if necessary.

6. REQUIRED KNOWLEDGE AND SKILLS Please list the knowledge and skills required for entry into your position, and not what you might necessarily know or be able to do after being in your position for a number of years. **Knowledge:** refers to the possession of concepts and information gained through experience, training and/or education and can be measured through testing. **Skills:** refers to proficiencies which can be demonstrated and are typically manual in nature and/or can be measured through testing.

Knowledge & Skills
1. Knowledge of and the ability to teach human anatomy and physiology, human development, pathophysiology, ante-mortem and post-mortem changes, and various forms of trauma identification.
2. Knowledge of and the ability to teach the main concepts of forensic science including criminalistics, odontology, anthropology, entomology, toxicology, ballistics, blood spatter analysis, evidence collection and chain of custody, etc.
3. Knowledge of and the ability to teach investigative techniques, principles, and practices used in the determination of cause and manner of death, including autopsy procedures, additional testing/examination, handling and maintaining evidence chain of custody, evidence collection and preservation, specimen collection and preservation, forensic photography, etc.
4. Ability to utilize and train other to utilize reference materials and information such as legal briefs, medical records, toxicology and autopsy reports, X-rays, police reports, professional literature, and medical reference texts to formulate an accurate cause and manner of death.
5. Ability to prepare, present, and maintain accurate, objective, and thorough reports and records, in addition to providing feedback and assisting with departmental reports and records.
6. Knowledge of and the ability to teach Wisconsin State Statutes pertaining to death investigations, including laws, legal codes, court procedures, precedents, government regulations, executive orders, jurisdiction, and agency rules.
7. Ability to establish and maintain effective working and public relationships and to communicate effectively and deal compassionately with grieving family members.
8. Ability to coach, mentor, counsel, discipline, and train new and existing staff members, communicate job expectations, monitor and appraise job results, enforce policies and procedures along with departmental quality and productivity standards.
9. Develop, maintain and enforce all departmental policies and procedures to include best practice standards, clear staff guidelines, guidance to outside agencies, etc.
10. Knowledge of basic finances and budget management to include budgeting, basic accounting, financial planning, grant management, revenue projections, etc.



7. EDUCATION - *This is very important.* Identify the minimum level of education you believe is needed to satisfactorily perform your job **at entry into your position**. This may be different from what the organization currently requires and/or from your own level of education.

Position

Requires:


- Less than High School Diploma or equivalent (G.E.D.) (ability to read, write, and follow directions)
- High School Diploma or equivalent (G.E.D.)
- Up to one year of specialized or technical training beyond high school
- Associate degree (A.S., A.A.) or two-year technical certificate
- Bachelor's degree in **Nursing, Forensic Science, or other health related field**

- Master's degree in _____

- Other (explain): **Preferably a Master's degree**

What field(s) should training or degree be in?

Nursing, Physician Assistance, Forensic Science, or other health related field

 **8. EXPERIENCE - *This is very important.***

Identify the minimum type and years of experience required for **entry into your position?**

	Minimum Time Required	
<u>Death investigation</u>	3	years
<u>Health care experince</u>	3	years
<u>Management experience</u>	5	years

9. SPECIAL REQUIREMENTS:

List any registrations, certifications or licenses that are required for **entry into your position.**

Do not use acronyms.

American Board of Medical Legal Death Investigation Certification

Active nursing or other health care related field licensure

10. MACHINES, TOOLS AND EQUIPMENT. List any specialized machines, tools, equipment or software used in your work and show the time spent using each. Do not list common office equipment and software such as Microsoft Office, e-mail applications, copiers, faxes, personal computers, etc.

Machines, Tools, Equipment	Time Infrequently <10% Seldom 10-25% Moderately 25-50% Frequently >50%
Medical Examiner Databse (in house built)	Frequently > 50%
Cayenta	Infrequently <10%

SVRIS	Frequently > 50%
Camera	Moderately 25% - 50%
Modified County van; cot and portable cot	Moderately 25% - 50%
Laserfiche	Frequently > 50%

11. DECISION-MAKING & JUDGMENTS.

a. Describe two decisions and/or judgments you make regularly and independently in the performance of your duties.

1. Determine the best course of action for the department in numerous different scenarios and circumstances.

2. Determine what is necessary for a thorough death investigation and be able to ensure those items are completed to a satisfactory level to determine an accurate cause and manner of death.

b. When making decisions do you most often (Check only one):

Routinely check with your supervisor before doing anything other than following standard procedures.

Follow standard procedures and established practices to resolve problems using limited discretion.

Use some discretion in your daily work and recommend new or revised policies, procedures and standard practices, which may be implemented after being approved by your supervisor.

Create and implement new solutions not previously applied.

c. Indicate which of the following types of decisions you make regularly in the course of your work.

<input checked="" type="checkbox"/>	I plan and schedule the work of others.
<input checked="" type="checkbox"/>	I set goals and objectives for others.
<input checked="" type="checkbox"/>	I provide training and instruction to others.
<input checked="" type="checkbox"/>	I assign work activities to others.
<input checked="" type="checkbox"/>	I establish standard procedures.
<input checked="" type="checkbox"/>	I make hiring and promotion decisions.
<input checked="" type="checkbox"/>	I provide discipline and performance counseling.
<input checked="" type="checkbox"/>	I provide advice to peers that they must consider carefully before making a decision.
<input checked="" type="checkbox"/>	I provide information to supervisors/management that they use in making a decision.

12. PHYSICAL FACTORS - *Your answers in this section will not affect how your job is classified.*

Check the box that best describes the overall amount of physical effort required to perform your job.

- Sedentary Work:** Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
- Light Work:** Exerting up to 20 pounds of force occasionally, and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for Sedentary Work and the worker sits most of the time, the job is rated for Light Work.
- Medium Work:** Exerting up to 50 pounds of force occasionally, and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
- Heavy Work:** Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
- Very Heavy Work:** Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

For each physical activity listed below, indicate the amount of time you spend performing each physical activity during the course of your work, and the level of importance of each physical activity to the performance of your essential duties.

Physical Activity	Frequency	Importance
Climbing: Ascending or descending ladders, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized.	Infrequently <10%	2--Very Important
Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces.	Frequently > 50%	3--Extremely Important
Stooping: Bending body downward and forward by bending spine at the waist.	Frequently > 50%	3--Extremely Important
Kneeling: Bending legs at knee to come to a rest on knee or knees.	Frequently > 50%	3--Extremely Important
Crouching: Bending the body downward and forward by bending leg and spine.	Frequently > 50%	3--Extremely Important
Crawling: Moving about on hands and knees or hands and feet.	Infrequently <10%	1--Somewhat Important
Reaching: Extending hand(s) and arm(s) in any direction.	Frequently > 50%	3--Extremely Important
Standing: Particularly for sustained periods of time.	Frequently > 50%	3--Extremely Important
Walking: Moving about on foot to accomplish tasks, particularly for long distances.	Frequently > 50%	3--Extremely Important
Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.	Frequently > 50%	3--Extremely Important
Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.	Frequently > 50%	3--Extremely Important
Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position.	Frequently > 50%	3--Extremely Important
Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling.	Frequently > 50%	3--Extremely Important
Grasping: Applying pressure to an object with the fingers or palm.	Frequently > 50%	3--Extremely Important

Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching the skin, particularly that of fingertips.	Frequently > 50%	3--Extremely Important
Talking: Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.	Frequently > 50%	3--Extremely Important
Hearing: Ability to receive detailed information through oral communication, and to make fine discriminations in sound, such as when making fine adjustments on machined parts.	Frequently > 50%	3--Extremely Important
Seeing: The ability to perceive the nature of objects by the eye.	Frequently > 50%	3--Extremely Important
Repetitive Motions: Substantial repetitive movements (motions) of the wrists, hands, and/or fingers.	Frequently > 50%	3--Extremely Important

13. WORKING CONDITIONS - Your answers in this section will not affect how your job is classified.

Check the box next to each working condition that you are subject to during the course of your work, and indicate the amount of time you are subject to that condition. **If most of your work is in an office setting, you may select the “Does Not Apply” box below.**

Does Not Apply

	Condition	Time
<input checked="" type="checkbox"/>	Hazardous physical conditions (mechanical parts, electrical currents, vibration, etc.)	Infrequently <10%
<input checked="" type="checkbox"/>	Atmospheric Conditions (fumes, odors, dusts, gases, poor ventilation)	Seldom 10% - 25%
<input checked="" type="checkbox"/>	Hazardous materials (chemicals, blood and other body fluids, etc.)	Frequently > 50%
<input checked="" type="checkbox"/>	Extreme temperatures	Seldom 10% - 25%
<input checked="" type="checkbox"/>	Inadequate lighting	Moderately 25% - 50%
<input checked="" type="checkbox"/>	Work space restricts movement	Moderately 25% - 50%
<input checked="" type="checkbox"/>	Intense noise	Infrequently <10%
<input checked="" type="checkbox"/>	Travel	Frequently > 50%
<input checked="" type="checkbox"/>	Environmental (disruptive people, imminent danger, threatening environment)	Seldom 10% - 25%

14. ADDITIONAL COMMENTS

Are there any additional comments you would like to make to be sure you have described your job adequately?

The Medical Examiner's Office operates 24 hours a day, 7 days a week regardless of weekends, holidays, and other events. We are an office of health care professionals that have previous health care experience and advanced training in forensic science, investigation techniques, post mortem changes and injury identification. We are required to respond to death scenes on short notice, most of the time having limited information as it pertains to the circumstances surrounding the death. Some death scene has less than ideal conditions and environmental hazards. We also need to be available at all times to screen and triage reported deaths, answer questions, and support the families we work with. Even when not on-call, all other staff members may be called in on short notice if the need arises. The Medical Examiner is required to be available to staff at all times of the day and night for assistance and guidance.

EMPLOYEE CERTIFICATION

I certify that the above statements and responses are accurate and complete to the best of my knowledge.
Digital Signatures are acceptable.

Signed: Jessica Blahnik Date: 04/27/2020

THANK YOU FOR COMPLETING THIS QUESTIONNAIRE. AFTER YOU OR YOUR GROUP HAVE COMPLETED YOUR PORTION OF THE QUESTIONNAIRE, PLEASE SUBMIT THE QUESTIONNAIRE TO YOUR SUPERVISOR FOR REVIEW, SIGNATURE, AND COMMENT. YOUR SUPERVISOR WILL THEN SUBMIT THE COMPLETED QUESTIONNAIRE TO HIS/HER DEPARTMENT HEAD.

TO BE COMPLETED BY SUPERVISOR

Use this section to note any additional comments, additional duties or disagreements with any section of the questionnaire. Do not change anything written by the individual filling out the questionnaire and do not address any performance issues. If you disagree with any information provided or believe some information is missing, indicate below the question number and your comments.

Question No.	Comments

Any supervisory comments must be discussed with the employee.

SUPERVISORY SIGNATURES (Digital signatures are acceptable)

Please check the appropriate statement:

- I agree with the incumbent’s position questionnaire as written.

- The above modifications have been discussed with the incumbent, and the incumbent agrees with these modifications.

- The above modifications have been discussed with the incumbent, and the incumbent disagrees with these modifications.

Supervisor Signature: _____ Date: _____

Department Head Signature: _____ Date: _____

I have noted the modifications made by my supervisor in the comments section above.

Employee Signature: _____ Date: _____

2021 POSITION RECLASSIFICATION REPORT

Department: Solid Waste
Current Classification and DBM: Waste Management Specialist

Requested Classification (DBM): B23
Incumbent: Eric Olson

Employee Resources
Recommendation: Reclassify from B22 to B23

Summary: Over the last 14 years, the responsibilities of the Waste Management Specialist (Environmental Systems and Pollution Control Specialist) has grown significantly, due to changes in federal and state laws and regulations and additional job duties assigned. Since the position was first created in 2006, the Solid Waste Department has shaped this position to reflect their integrated system and added on responsibilities that are beyond the basics of landfill gas wells.

The Waste Management Specialist is responsible for overseeing the daily operations of the Solid Waste Gas Collection and Control System, embedded within three (3) landfills on site, serving customers and communities throughout Central and North-Central Wisconsin. The incumbent works directly with Marathon County Solid Waste operations staff to ensure an enclosed sanitary landfill system.

In addition, the Waste Management Specialist plays an integral role in the decision making process and coordination of all work at the site, provides leadership and guidance for operations staff, and helps others to understand the context of the regulations that must be followed. Landfills are very complex and constantly changing, thus, requiring critical thinking and decision making on a daily basis. Failure to properly manage the dynamics of the pollution control system can result in unsafe conditions, structural inability, and severe environmental contamination.

Final Recommendation: After reviewing the classification structure, and applying the Decision Band Method of Job Evaluation, it has been determined that the position's duties and responsibilities have increased to the level that is aligned with the existing Senior Maintenance Specialist classification (B23) which represents similar positions at Solid Waste with specialized knowledge, decision making and expertise in compliance and environmental health & safety. It is the recommendation of the Employee Resources Department to reclassify the Waste Management Specialist Classification from B22 to B23. This recommendation better aligns the position's responsibilities within the department and throughout the county classification system in a consistent and fair manner.

Reclassify the incumbent to Senior Maintenance Specialist, B23 effective 1/10/2021.

Employee	Current Rate	New Rate
Eric Olson	\$21.22	\$21.87

2021 Total Fiscal Impact: \$1,561

Submitted by Sue Fox and Boly Vang

Reclassification/Pay Grade Adjustment

Solid Waste - Waste Management Specialist - B22

Proposed to Senior Maintenance Specialist - B23

1 Full time Employee 100.00%

Annual Hours 2080

Current DBM

Item	Projected 2021 Rates	Minimum	Mid-Point	Maximum
		\$17.66	\$20.75	\$24.55
DBM B22		\$36,733	\$43,160	\$51,064
FICA Retirement	6.20%	\$2,277	\$2,676	\$3,166
FICA Medicare Rate	1.45%	\$533	\$626	\$740
Unemployment Insurance	0.10%	\$37	\$43	\$51
Retirement - Employer	6.75%	\$2,479	\$2,913	\$3,447
Worker's Comp - Municipal	0.98%	\$360	\$423	\$500
Estimated Cost		\$42,419	\$49,841	\$58,968

Proposed DBM and Wage Increase to Hourly Rate Effective pay period 1/10/2021

Item	Projected 2021 Rates	Minimum	Mid-Point	Maximum
		\$19.15	\$22.50	\$26.63
DBM B23		\$39,832	\$46,800	\$55,390
FICA Retirement	6.20%	\$2,470	\$2,902	\$3,434
FICA Medicare Rate	1.45%	\$578	\$679	\$803
Unemployment Insurance	0.10%	\$40	\$47	\$55
Retirement - Employer	6.75%	\$2,689	\$3,159	\$3,739
Worker's Comp - Municipal	0.98%	\$390	\$459	\$543
Estimated Cost		\$45,999	\$54,046	\$63,964
Cost to Reclass from B22 to B23:		\$3,580	\$4,205	\$4,996

One Employee in ths position:	Current Rate	Requested Rate	2021 Budget Impact
	From DBM B22	To DBM B23	
Eric Olson	\$21.22	\$21.87	\$1,561
Fiscal Impact			\$1,561

APPENDIX A
Classification Review Request - Updated 3/25/15

Employee Resources Department accepts request for classification review during the month of April – April 1st through April 30th.

Your Name: Eric D Olson

Your Supervisor's Name: David Hagenbucher

Your Division: Solid Waste

Your Department: Solid Waste

Your Current Classification: B22

- My job has changed since I filled out my PDQ. (Attach a new or updated PDQ)
When updating the prior PDQ, make all changes in red on the original PDQ before submitting it to the Employee Resources Department.

Requested Classification: B23

Please specify why you believe the requested classification is more appropriate for your position than the current classification. Relate duties you perform to the essential duties and class concept listed for the requested classification:

Position Summary

The Environmental Systems and Pollution Control Specialist is responsible for overseeing the daily operations of the Solid Waste Gas Collection and Control System embedded within the 3 landfills on site serving customers and communities throughout Central and North-Central Wisconsin. The Environmental Systems and Pollution Control Specialist works directly with MCSWD operations staff to ensure an enclosed sanitary landfill system that contains the waste from over 16 counties. The ESPCS is responsible for monitoring landfill gas collection and treatment methods of either flare or landfill gas energy recovery engines. Frequent monitoring and adjustments of 56 LFG wellheads and 18 future LFG wellheads, to adhere to strict state and federal guidelines, while being conscious of the local environmental impacts of landfill gas recovery. The ESPCS is responsible for containing leachate and gas condensate liquids, which are direct possible contaminants to the local environment and ground water supply. There are 22 pumping stations on site that either collect or produce leachate and gas condensate monitoring, troubleshooting and repair of these systems is essential. Inability to maintain the liquids will directly affect the GCCS and the environment.

The ESPCS is responsible for minimizing leachate generation all together. Future lift design is essential in creating an operations surface that sheds storm water. The ESPCS utilizes a survey grade Global Positioning System (GPS) to design a lift that sheds precipitation to storm-water collection infrastructure while creating a sloped surface that enhances driving and drying conditions. The ESPCS can balance these process to create a synergy between the above factors.

The ESPCS maintains intermediate cover which reduces or eliminates groundwater and air quality contamination, decreases vector and wind-blown litter issues, promotes growth of vegetation which is essential to erosion control. This prevents Surface Emission points of landfill gases and odors and reduces risk and likelihood of leachate breakout (seeps). The intermediate cover process is installed, supplemented, repaired and monitored by the Environmental Systems and Pollution Control Specialist. Intermediate cover practices can and will prevent significant costs in remediation and clean-up of fugitive materials and liquids leaving the 3 landfill sites.

Landfill gas and leachate control systems have a significant amount of systems, displays, sensors and meters to tend to, contributing to the specialized nature of the position is additional monitoring devices such as the Elkins Envision LFG monitor, the Toxic Vapor Analyzer and Forward Looking Infrared unit for collecting field data, adhering to permits and policy. The ESPCS is responsible for the diagnostics, hardware, files, configuration, equipment selection and testing of the GPS system. The GPS system is critical to compaction, infrastructure building, marking hazardous loads, locating potential and existing piping, wiring and significant investments into the site and safety of the MCSWD. The ESPCS utilizes GPS to fulfill Construction Quality Assurance of expensive landfill projects, saving money while being involved in the installation quality and build of our pollution control systems.

Essential Duties and Decisions Required

1. Daily Operations

- a. Monitor SCADA system telemetry and trends while providing LFG data to director, engineers and contractors.
- b. Evaluate Issues with LFG hardware including valves, piping, wellheads, blower, condensate sumps and knockouts.
- c. Manage and conduct a rigorous environmental monitoring program for air, water, and soil resources and use strategic thinking to evaluate potential contamination areas to these resources.
- d. Manage and provide direction and assistance to employees and interns working on gas collection, leachate collection, storm water, vegetation, refuse fill sequencing. Assist and coordinate, hazardous waste, soil relocation.
- e. Monitor, document and submit wellfield, surface emissions, cover integrity, gas probe data, etc. to maintain permit compliance.
- f. Monitoring, calibration and repairing equipment, sensors and personal protection monitors.
- g. Apply, monitor, repair, test and manage Intermediate cover and vegetation.
- h. Install, monitor, tune and repair Landfill Gas Wellheads and piping.
- i. Equipment operation for compacting trash, applying cover materials, cleaning leachate breakouts, managing yard waste and clean debris, building roads and infrastructure, seeding and erosion, assisting vehicles in inclement weather and snow removal applications.

- j. High Density Polyethylene (HDPE) welding and assembly for LFG utilization, leachate controls and piping and storm-water applications.
- k. Pumping knowledge and diagnostics for operation, repairs, systems function and spill prevention.
- l. Lift design for storm-water shedding, leachate generation reduction, truck travel and management, fill sequencing and compaction maximization.
- m. Metal welding and fabrication of vital structure, equipment and implements.
- n. GPS equipment design, build, layout, reception, outage diagnosis, repair and troubleshooting, calibration, coordination and training with contractor and creation of remote nodes.
- o. Site maintenance, upkeep, storm-water, traffic controls, user area design, build, create. Trail and recreation coordination, build and updates.
- p. Compaction analysis and assistance of daily operations, technique and training for maximization of airspace and efficiency in site fill sequencing and general operations.
- q. Site composting improvements, layout and area creation. Monitoring of compost materials and proper processing materials suitable for diversion from landfills.

2. Assistance and backup roles

- a. HAZWOPER certified and trained in Hazardous waste facility usage, services, processing and sorting.
- b. Customer interaction, guidance, assistance and site user facilities.
- c. Fill-in scale operations in both previous and current scale programs and customer interactions.
- d. Assistance and fill-in during pandemic situation to provide direction, advice and interaction for remote managers.

3. Training

- a. Training and assistance with current and future operations staff
- b. Site processes and policy advice to customers, contractors, new employees
- c. Training and education of customers, visitors, employees, county associates of waste and recycling systems.

Required Knowledge and Skills

- Understanding of landfill systems, piping and controls
- Knowledge of landfill operating systems and various data collection systems
- Ability to review, categorize, prioritize, and/or analyze data and exercise discretion in interpreting data and implementing a course of action in response to changes that occur
- Ability to read, interpret engineering drawings, interact with regulators and engineers
- Knowledge of soil types and impact of soils on waste and vegetation
- Strong motivation, leadership skills and public speaking engagements
- Very strong written and oral communication skills
- Complete knowledge of GPS systems
- Knowledge in core values of an efficient and productive government organization
- Knowledge in recognizing unsafe practices and implementing action for change
- Knowledge meters and equipment to monitor and collect field data

- Ability to make decisions with and without others based on situational options.
- Constructive criticism and positive feedback strategies
- Ability to work in adverse environments and inclement weather
- Effective in contributing and leading in meetings and communication
- Skilled in operating all equipment used in performing essential functions
- Ability to exercise judgment, decisiveness, and creativity in problem solving
- Ability to establish effective working relationships with other employees, customers, and the public
- Ability to effectively share information with other staff and work as part of a team
- Time management, record keeping, and organizational skills

Use additional sheets if necessary

Eric D. Olson	4/28/20
Employee Signature / Typed Name	Date

Employee: Complete and forward this form to your immediate supervisor for review and comment. Your supervisor will review your request, make comments and forward to your department head. Your department head will review your request, make comments as appropriate and then forward it to the Employee Resources Department no later than **April 30th**. Classification Review Requests must include the immediate supervisor and department head comments and signatures.

Immediate Supervisor Comments

- I agree with the employee's review request.
- I disagree with the employee's review request.

Reason/comment:

The Environmental Systems and Pollution Control Specialist is responsible for ensuring that protection of human health and the environment is the absolute highest priority. This position works in conjunction with the Operations Manager, the State of Wisconsin regulatory agency, and multiple engineering firms tracking, logging, and analyzing critical information needed to keep the environment safe. The decisions that this person is responsible for are monumental in that they reflect not only the department's ability, but the health and safety of the entire county. Keeping the air and water clean are not only essential to sustain life, it is mandated by State and Federal law. Without the leadership, problem solving abilities, and coordination skills of this position, there would be countless detrimental impacts to community health. Our greatest measure of success depends heavily on the abilities of this professional to perform the work.

The current position classification was determined by factoring in the oversight of two landfills, an incoming waste tonnage of 125,000 tons per year, and a very basic gas collection system that required little oversight. The Environmental Systems and Pollution Control Specialist is now responsible for managing three landfills totaling 200,000 tons per year and an abundance of complex pollution control infrastructure. They play an integral role in the decision making process and coordination of all work at the site, providing leadership and guidance for the entire operations staff, facilitating with others to understand the context of the regulations we all must follow. Additionally, the WDNR and EPA continue to modify laws which result in increasingly complicated adaptations to meet those requirements. Moreover, landfills are dynamic, constantly changing as the waste mass decomposes, thus requiring implementation of critical decisions and new ideas on a daily basis. Utilization of biology, chemistry, physics, and engineering all play a serious role in the proper management of the sites.

Failure to properly manage the dynamics of the pollution control systems can result in unsafe conditions, severe environmental contamination, structural instability, and the potential for loss of human life. Furthermore, without a qualified professional completing this work, the County is at risk for serious environmental fines and possible rejections of future site expansions, leaving north central Wisconsin without a suitable waste disposal system. It is vital that the person holding this position understands the importance of the responsibilities associated with the work. Proper management will ensure protection of human health and the environment, and will contribute to making Marathon County a healthy and safe place to live.

I fully support the adjustment of this position classification. The position has grown tremendously over the past 15 years, and is essential to our entire organization. The knowledge, skills, and strengths that this position requires are far beyond that of any entry level classification. Changing the classification not only provides a justified financial increase for the current holder of the position, but minimizes the potential for employee turnover due to the high

demand for someone with this unique skillset. Moreover, it will increase the interest for future holders of this position, and will likely contribute to receiving highly qualified professionals rather than entry level applicants during the hiring process.

David J. Hagenbucher	4/28/20
Immediate Supervisor Signature / Typed Name	Date

Immediate Supervisor: Complete and forward this form to your Department Head. The Department Head will review this request and make changes as appropriate. Please note that all appeals must be forwarded to the department head no later than **April 30th**.

Department Head or Designee Comments

I agree with the employee's review request.

I disagree with the employee's review request.

Reason/comment: The rigors of operating a municipal solid waste landfill become greater and greater every day. Federal and state laws and regulation make addition work each year. When this position was created in 2006 its primary focus was not done with the lens of a large interconnected structure...the tasks were not considered as part of an integrated system. Over the course of the decade and a half we have shaped this position to reflect that integration and added on responsibilities that are beyond the basics of landfill gas wells. This position has become the critical lynchpin tying the unpredictable fluctuations of decomposing wastes and to absolute compliance with Clean Air Act provisions.

As well, we have added on the duties of coordinating the entire GPS system used for operations. Devices are included on all equipment and the collected data is translated to programs used to set operational slopes, working faces and weekly operational plans. This means the individual in this role needs to be expert in not only the GPS devices used on each piece of equipment, but also in the software used to create maps and plans. This work helps us work efficiently and safely.

For all of the noted discussion of this discussion, I strong support this reclassification.

Meleesa Johnson	April 29, 2020
Department Head Signature / Typed Name	Date

Department Head: Complete and forward this form to the Employee Resources Department. The Employee Resources Department will review this request and make changes as appropriate.

Please note that all review requests must be filed with the Employee Resources Department no later than **April 30th**.

Marathon County Position Description Questionnaire

Return Completed Form To Employee Resources Department

1. EMPLOYEE INFORMATION: In this section you will provide information regarding your name, current job title, your immediate supervisor, etc. This information will help us make sure we refer to the correct job throughout the study.

Employee Name: Eric D. Olson **Date Form Completed:** 4/27/2020

Official Job Title: Environmental Systems and
Pollution Control Specialist **Department:** Solid Waste

Work Phone: 715-297-0429 **Site:** Solid Waste

E-mail: Eric.olson@co.marathon.wi.us **Time in Current
Position:** 0 years 6 months

Immediate Supervisor: **Immediate supervisor reports to:**

Name: David Hagenbucher **Name:** Meleesa Johnson

Title: Operations Manager **Title:** Director

Work Phone: 715-551-5864 **Work Phone:** 715-446-3101

E-mail: david.hagenbucher@co.marathon.wi.us **E-mail:** meleesa.johnson@co.marathon.wi.u



2. POSITION SUMMARY- This is very important.

Please write 1 to 3 sentences which describe the purpose and major duties of your position.

Example: I provide administrative support to the purchasing department. My duties include answering phones, filing and retrieving documents, answering questions from vendors, entering data, and tracking documents.

I am responsible for the daily operation of the Gas Collection and Control System. This includes all landfill gas (LFG) related monitoring of LFG wellfield, LFG quality and compliance records, surface conditions and emissions and site pollution possibilities. I am also responsible for landfill construction quality assurance (CQA), Global Positioning Systems (GPS), heavy equipment operation, training of operations staff and vegetation and stormwater management.



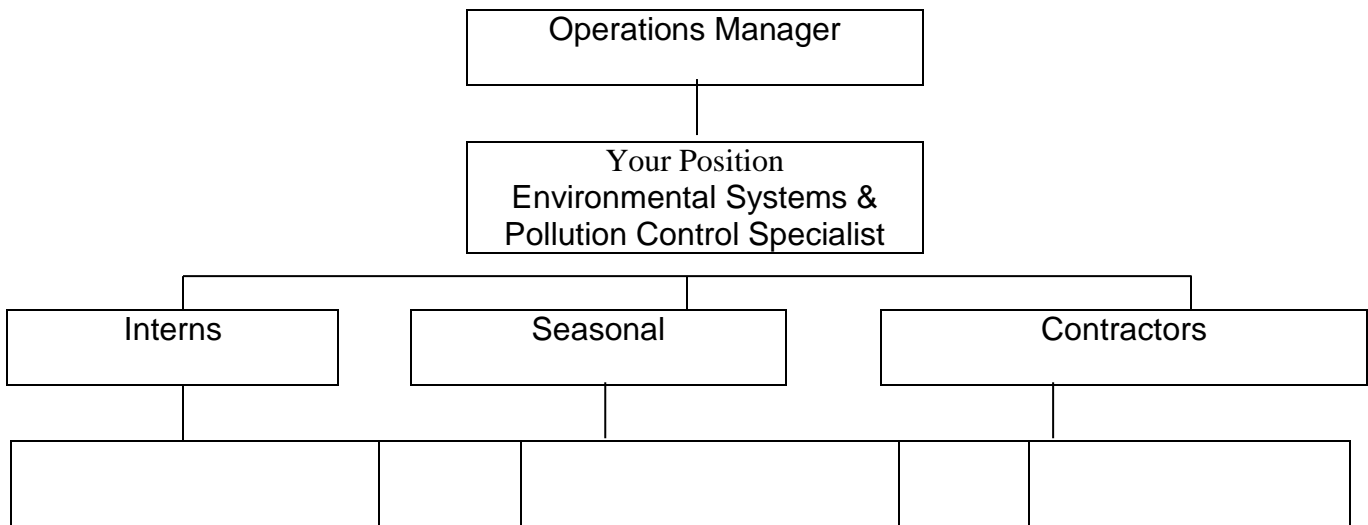
3. SUPERVISORY RESPONSIBILITIES – This is very important.

For each statement in the chart below, if the statement applies to your position, please check the box under the “Yes” column and then indicate the number of employees for which you are responsible to the right of the statement.

Yes	Duty	Full-time Equivalent Employees	Head Count
<input type="checkbox"/>	I do not officially supervise other employees (sign performance reviews).	NA	NA
<input type="checkbox"/>	I evaluate and sign performance reviews of other regular employees.		
<input checked="" type="checkbox"/>	I provide work direction to and review the work of student workers, temporary and/or contract employees.		5-10

4. ORGANIZATION CHART

Complete the organization chart below. **Please use titles and not names.** List only those positions for which you sign performance evaluations.





5. ESSENTIAL DUTIES. *This is very important.*

In the table below, please list your essential duties (**those duties that make up at least 5% of your time**), and the decisions you make in carrying out each duty. Provide enough detail so that someone who may not be familiar with your job will have a clear understanding of what it is that you do. For example, do not simply state “prepares reports”, but state “prepares reports such as status reports, staff reports”, or other type of report(s) you may prepare. Also, please use action verbs such as prepares, calculates, operates, etc., to start off each statement. Avoid phrases such as “assists with” or “participates in.” **Do not use acronyms.**

In the Frequency column, please indicate how often you perform each duty: D = daily, W = weekly, M = monthly, Q = quarterly, A = annually, or O = occasionally.

In the “Percent of Time” column please indicate how much of your time you spend on each task. The total of these percentages **should not be more than 100%**. Example: Sally conducts property value estimates 20% of the time, it may mean she spends one day out of five on that task, or that she spends around two hours each day. These need only be estimates so do not spend a great deal of time trying to come up with an exact percentage. The percentages of your essential duties should not exceed 100%, but should account for at least 80% of your time.

Essential Duties (What you do and how you do it.)	Decisions Required	Frequency: D = Daily W = Weekly M = Monthly Q = Quarterly A = Annually O = Occasionally	% of Time
EXAMPLES: (List actual essential duties below examples)			
<i>Prepares monthly newsletters by gathering information, writing copy, editing, and preparing for publication.</i>	<i>Articles to include, editorial changes, graphics, layouts</i>	<i>M</i>	<i>25%</i>
<i>Performs inventory spot checks and monthly counts of supplies in warehouse.</i>	<i>When to check supplies</i>	<i>M</i>	<i>10%</i>
1. Environmental & Pollution Monitoring	<ul style="list-style-type: none"> • Monitoring landfill gas (LFG) collection and approved treatment methods of either the flare or LFG energy recovery engines. • Trained field data collection of wellhead concentrations and adjustments, surface emissions and gas migration off site. For the purpose of maintain compliance to strict Federal regulations which are implemented at the state level while preventing penalty of up 	Weekly	15%

	<p>to \$25,000 per day. These regulations include EPA Greenhouse Gas emissions standards, the Clean Air Act 42 U.S.C. §7401 et seq. (1970) particularly the amendments in 1990 issuing technology based standards for emissions. In addition the landfill emissions are subject to the New Source Performance Standards (NSPS) 40 CFR 60 subpart WWW which is designed to "reduce emissions of methane rich landfill gas"</p> <ul style="list-style-type: none"> Utilizes the latest tools and meters for determining quality readings of landfill systems, sensors and byproduct parameters per compliance standards. 		
<p>2. Environmental Infrastructure Operation, Control, Monitoring and Repair</p>	<ul style="list-style-type: none"> Monitors and repairs Area A, B and BBR landfills separate landfill gas collection wellfields consisting of a total of 56 wellheads with over 7.1 miles of landfill gas and condensate piping delivery, in-ground and waste. Maintains 3 separate dual contain leachate and condensate collection systems with 22 individual pumping sites responsible for capturing and containing contaminant rich liquids to the proper 	<p>Daily</p>	<p>20%</p>

	<p>processing facilities.</p> <ul style="list-style-type: none"> Assesses pollution prevention systems for function, repair and additional needs to protect human health and the environment. Directly impacting air and water quality in addition to local private assets. 		
3. Regulatory Compliance and Submissions	<ul style="list-style-type: none"> Create, sort and compiles records and data fields for organization and submission to air and groundwater quality engineers and state regulators to maintain compliance with records requests, Air and Plan of Operations permitting, GHG regulations NSPS and CAA. Coordinates and communicates with state level regulators on records requests, odor related query's and site inspections. 	Monthly	10%
4. Environmental Systems Technologies	<ul style="list-style-type: none"> Operate, monitor, troubleshoot, repair, fabricate and coordination with LFG operating systems and displays. Inspect, monitor and report Master Terminal Unit (MTU), Remote Terminal Unit (RTU) and Variable Frequency Drive (VFD) and physical parameters of LFG Blower inputs, piping and delivery of landfill gas to approved treatment methods. Collection, 	Daily	10%

	generation and submission of Supervisory Control and Data Acquisition (SCADA) system reporting for regulators, contractors, customers and compliance purposes.		
5. Efficiency and Global Positioning Systems Management	<ul style="list-style-type: none"> • Manages Global Positioning System (GPS), implements overall system design and function. Configures, troubleshooting and repair of GPS system with an ever-growing site and waste masses. • Conducts communications with vendor and contractors for replacements and upgrades to maximize utilization of GPS system for site designation, compaction and processing needs. • Coordinates, creates and implements infrastructure design and lift fill-sequencing with operations staff and supervisors utilizing GPS asset to maximize efficiency, filling of sanitary landfill, customer and trucking efficiency, leachate generation reduction, tipping surface conditions and storm-water shedding and control. 	Daily	10%
6. Engineering Designs, Implementation and Collaboration	<ul style="list-style-type: none"> • Implements engineering drawings to field applications, conducts field Construction Quality Assurance in house to 	Monthly	10%

	<p>accurately assess and execute construction plans to strict code and specifications. Completes daily report updating, communicating and reporting for assurance and reference potentials.</p> <ul style="list-style-type: none"> Utilizes GPS systems for marking and surveying layouts of future and existing infrastructure to minimize costs and delays. Verification of as built construction projects, in ground features needing coordinates and understanding of actual infrastructure location. Works with engineering firm representatives to create additional solutions and innovations to accurately solve and remedy onsite needs. 		
<p>7. Operations Planning, Methods, Execution and Problem Solving</p>	<ul style="list-style-type: none"> Collaborates with operations staff to create solutions to ever-changing waste intake and methods of disposal. Provide guidance and assistance in learning and operating techniques. Engages in training of past and current operations staff and interns of most efficient usage of fuel, time and space for the purposes of maximizing Airspace Utilization Factors (AUF). This 	<p>Daily</p>	<p>15%</p>

	<p>includes equipment, methodology and GPS usage to enhance efficiency of operations as a whole.</p> <ul style="list-style-type: none"> • Supports and challenges staff members to adhere to core values, policy and processes discussed and issued by management, leads by example to follow county and department goals for members, staff, customers and residents alike. 		
8. Community Engagement and Education	<ul style="list-style-type: none"> • Conducts regular on-site tours for all citizens • Engages with county staff on education opportunities with waste reduction, recycling and sanitary landfill processes as it relates to society and waste issues. • Collaborates with state and national waste industry organizations on topics such as safety, state of the industry and waste and recycling topics. • Promotes wellness initiatives in on site after hours activities 	Monthly	5%
9. Site Maintenance and Recreational User Coordination	<ul style="list-style-type: none"> • Executes any and all site maintenance tasks ranging from snow removal to asset managements, repairs and upgrades. Including training of those processes with new hire staff. • Coordinates onsite assistance and in-kind allocation of 	Monthly	5%

	materials, labor and structures to promote local recreational activity, outreach and learning of waste industry.		
10. Alternate Designation and Assistance Roles	<ul style="list-style-type: none"> Adapts to the ever-changing needs of the facility on a daily basis, able to fill in on Scalemaster duties, equipment repairs, hazardous waste intake and processing, interim leadership during vacation or pandemic situations. 	Occasionally	
11. Other duties as assigned.		Select	

Attach additional sheets if necessary.

6. REQUIRED KNOWLEDGE AND SKILLS Please list the knowledge and skills required for entry into your position, and not what you might necessarily know or be able to do after being in your position for a number of years. **Knowledge:** refers to the possession of concepts and information gained through experience, training and/or education and can be measured through testing. **Skills:** refers to proficiencies which can be demonstrated and are typically manual in nature and/or can be measured through testing.

Knowledge & Skills
1. Knowledge of landfill gas generation and capture methods and processes
2. Ability to establish effective working relationships with other employees, customers, and the public
3. Skilled in operating all equipment used in performing essential functions
4. Ability to work in adverse environments, harsh conditions and inclement weather
5. Knowledge of landfill operating systems and various data collection systems
6. Ability to read, interpret engineering drawings, interact and communicate exceptionally with regulators, customers, contractors and engineers
7. Knowledge of soil types and impact of soils on waste and vegetation
8. Knowledge of meters and equipment to monitor and collect field data
9. Complete knowledge of GPS systems, applications, data processing and field usage.
10. Ability to review, categorize, prioritize, and/or analyze data and exercise discretion in interpreting data and implementing a course of action in response to changes that occur



7. EDUCATION - *This is very important.* Identify the minimum level of education you believe is needed to satisfactorily perform your job **at entry into your position**. This may be different from what the organization currently requires and/or from your own level of education.

**Position
Requires:**

- Less than High School Diploma or equivalent (G.E.D.) (ability to read, write, and follow directions)
- High School Diploma or equivalent (G.E.D.)
- Up to one year of specialized or technical training beyond high school
- Associate degree (A.S., A.A.) or two-year technical certificate
- Bachelor's degree in _____

- Master's degree in _____

- Other (explain): _____

What field(s) should training or degree be in?

Engineering, soil science, environmental health and safety, waste management, hazardous waste management, environmental studies, fluid physics, organic chemistry, bio-geo chemistry, hydrogeology, geotechnical soil properties.

 **8. EXPERIENCE - *This is very important.***

Identify the minimum type and years of experience required for **entry into your position?**

	Minimum Time Required	
Landfill GCCS systems, monitoring devices and tools	2	years
Environmental regulation, policy and protection	2	years
Heavy equipment operation	2	years

9. SPECIAL REQUIREMENTS:

List any registrations, certifications or licenses that are required for **entry into your position.**

Do not use acronyms.

Department of Natural Resources operator or manager license & continuing education

Hazwoper certification and continuing education

Manager of Landfill Operations (MOLO) and continuing education

GPS Systems Training and continuing education

10. MACHINES, TOOLS AND EQUIPMENT. List any specialized machines, tools, equipment or software used in your work and show the time spent using each. Do not list common office equipment and software such as Microsoft Office, e-mail applications, copiers, faxes, personal computers, etc.

Machines, Tools, Equipment	Time Infrequently <10% Seldom 10-25% Moderately 25-50% Frequently >50%
SCADA system, MTU, RTU	Frequently > 50%
GPS systems and rover, Carlson Command Compaction software	Moderately 25% - 50%
Loader	Moderately 25% - 50%
Dozer	Moderately 25% - 50%
Landfill Compactor	Seldom 10% - 25%
Elkins Envision, Thermofischer TVA 1000B & FLIR infrared device	Frequently > 50%

11. DECISION-MAKING & JUDGMENTS.

a. Describe two decisions and/or judgments you make regularly and independently in the performance of your duties.

1. Monitor, record and evaluate wellhead adjustments to control landfill gas parameters such as Methane, Oxygen and Carbon Dioxide levels and core LFG temperatures to maintain compliance per state and federal requirements. Evaluating timing and upgrades based on this data to work with engineers to determine maximum efficiency of wellheads, wellfields and landfill gas capture.

2. Selecting LFG system piping, infrastructure, operations, intermediate cover erosion, diagnostics and repair priority. To be able to remediate issues as necessary as quickly and efficiently as possible, while managing strict monitoring schedule deadlines. For direct protection of water and air quality, human health and the environment. To balance compliance, efficiency, schedule and resources.

b. When making decisions do you most often (Check only one):

Routinely check with your supervisor before doing anything other than following standard procedures.

Follow standard procedures and established practices to resolve problems using limited discretion.

Use some discretion in your daily work and recommend new or revised policies, procedures and standard practices, which may be implemented after being approved by your supervisor.

Create and implement new solutions not previously applied.

c. Indicate which of the following types of decisions you make regularly in the course of your work.

<input type="checkbox"/>	I plan and schedule the work of others.
<input type="checkbox"/>	I set goals and objectives for others.
<input checked="" type="checkbox"/>	I provide training and instruction to others.
<input type="checkbox"/>	I assign work activities to others.
<input checked="" type="checkbox"/>	I establish standard procedures.
<input type="checkbox"/>	I make hiring and promotion decisions.
<input type="checkbox"/>	I provide discipline and performance counseling.
<input checked="" type="checkbox"/>	I provide advice to peers that they must consider carefully before making a decision.
<input checked="" type="checkbox"/>	I provide information to supervisors/management that they use in making a decision.

12. PHYSICAL FACTORS - Your answers in this section will not affect how your job is classified.

Check the box that best describes the overall amount of physical effort required to perform your job.

- Sedentary Work:** Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
- Light Work:** Exerting up to 20 pounds of force occasionally, and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for Sedentary Work and the worker sits most of the time, the job is rated for Light Work.
- Medium Work:** Exerting up to 50 pounds of force occasionally, and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
- Heavy Work:** Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
- Very Heavy Work:** Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

For each physical activity listed below, indicate the amount of time you spend performing each physical activity during the course of your work, and the level of importance of each physical activity to the performance of your essential duties.

Physical Activity	Frequency	Importance
Climbing: Ascending or descending ladders, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized.	Moderately 25% - 50%	2--Very Important
Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces.	Moderately 25% - 50%	3--Extremely Important
Stooping: Bending body downward and forward by bending spine at the waist.	Seldom 10% - 25%	1--Somewhat Important
Kneeling: Bending legs at knee to come to a rest on knee or knees.	Seldom 10% - 25%	1--Somewhat Important
Crouching: Bending the body downward and forward by bending leg and spine.	Infrequently <10%	1--Somewhat Important
Crawling: Moving about on hands and knees or hands and feet.	Never	0--Not Important
Reaching: Extending hand(s) and arm(s) in any direction.	Frequently > 50%	2--Very Important
Standing: Particularly for sustained periods of time.	Infrequently <10%	1--Somewhat Important
Walking: Moving about on foot to accomplish tasks, particularly for long distances.	Frequently > 50%	2--Very Important
Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.	Seldom 10% - 25%	1--Somewhat Important
Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.	Seldom 10% - 25%	1--Somewhat Important
Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position.	Moderately 25% - 50%	2--Very Important
Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling.	Frequently > 50%	2--Very Important

Grasping: Applying pressure to an object with the fingers or palm.	Moderately 25% - 50%	1--Somewhat Important
Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching the skin, particularly that of fingertips.	Infrequently <10%	1--Somewhat Important
Talking: Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.	Frequently > 50%	2--Very Important
Hearing: Ability to receive detailed information through oral communication, and to make fine discriminations in sound, such as when making fine adjustments on machined parts.	Moderately 25% - 50%	3--Extremely Important
Seeing: The ability to perceive the nature of objects by the eye.	Frequently > 50%	3--Extremely Important
Repetitive Motions: Substantial repetitive movements (motions) of the wrists, hands, and/or fingers.	Moderately 25% - 50%	1--Somewhat Important

13. WORKING CONDITIONS - Your answers in this section will not affect how your job is classified.

Check the box next to each working condition that you are subject to during the course of your work, and indicate the amount of time you are subject to that condition. **If most of your work is in an office setting, you may select the “Does Not Apply” box below.**

Does Not Apply

	Condition	Time
<input checked="" type="checkbox"/>	Hazardous physical conditions (mechanical parts, electrical currents, vibration, etc.)	Seldom 10% - 25%
<input checked="" type="checkbox"/>	Atmospheric Conditions (fumes, odors, dusts, gases, poor ventilation)	Frequently > 50%
<input checked="" type="checkbox"/>	Hazardous materials (chemicals, blood and other body fluids, etc.)	Moderately 25% - 50%
<input checked="" type="checkbox"/>	Extreme temperatures	Frequently > 50%
<input checked="" type="checkbox"/>	Inadequate lighting	Seldom 10% - 25%
<input checked="" type="checkbox"/>	Work space restricts movement	Infrequently <10%
<input checked="" type="checkbox"/>	Intense noise	Frequently > 50%
<input checked="" type="checkbox"/>	Travel	Frequently > 50%
<input checked="" type="checkbox"/>	Environmental (disruptive people, imminent danger, threatening environment)	Seldom 10% - 25%

14. ADDITIONAL COMMENTS

Are there any additional comments you would like to make to be sure you have described your job adequately?

Problem solving and Critical thinking as it pertains to multiple variables in landfill related systems is essential to diagnose, test, repair and monitor.

EMPLOYEE CERTIFICATION

I certify that the above statements and responses are accurate and complete to the best of my knowledge.
Digital Signatures are acceptable.

Signed: Eric D. Olson Date: 04/27/20

THANK YOU FOR COMPLETING THIS QUESTIONNAIRE. AFTER YOU OR YOUR GROUP HAVE COMPLETED YOUR PORTION OF THE QUESTIONNAIRE, PLEASE SUBMIT THE QUESTIONNAIRE TO YOUR SUPERVISOR FOR REVIEW, SIGNATURE, AND COMMENT. YOUR SUPERVISOR WILL THEN SUBMIT THE COMPLETED QUESTIONNAIRE TO HIS/HER DEPARTMENT HEAD.

TO BE COMPLETED BY SUPERVISOR

Use this section to note any additional comments, additional duties or disagreements with any section of the questionnaire. Do not change anything written by the individual filling out the questionnaire and do not address any performance issues. If you disagree with any information provided or believe some information is missing, indicate below the question number and your comments.

Question No.	Comments
	I fully support the adjustment of this position classification. The position has grown tremendously over the past 15 years, and is essential to our entire organization. The knowledge, skills, and strengths that this position requires are far beyond that of any entry level classification. Changing the classification not only provides a justified financial increase for the current holder of the position, but minimizes the potential for employee turnover due to the high demand for someone with this unique skillset. Moreover, it will increase the interest for future holders of this position, and will likely contribute to receiving highly qualified professionals rather than entry level applicants during the hiring process.

Any supervisory comments must be discussed with the employee.

SUPERVISORY SIGNATURES (Digital signatures are acceptable)

Please check the appropriate statement:

I agree with the incumbent’s position questionnaire as written.

The above modifications have been discussed with the incumbent, and the incumbent agrees with these modifications.

The above modifications have been discussed with the incumbent, and the incumbent disagrees with these modifications.

Supervisor Signature: David J. Hagenbucher _____
04/28/20_____

Date:

Department Head Signature: _____ Date: _____

I have noted the modifications made by my supervisor in the comments section above.

Employee Signature: Eric D. Olson
04/28/20

Date:

2021 POSITION RECLASSIFICATION REPORT

Department: Solid Waste
Current Classification and DBM: Waste Management Specialist

Requested Classification (DBM): B23
Incumbent: Eric Olson

Employee Resources
Recommendation: Reclassify from B22 to B23

Summary: Over the last 14 years, the responsibilities of the Waste Management Specialist (Environmental Systems and Pollution Control Specialist) has grown significantly, due to changes in federal and state laws and regulations and additional job duties assigned. Since the position was first created in 2006, the Solid Waste Department has shaped this position to reflect their integrated system and added on responsibilities that are beyond the basics of landfill gas wells.

The Waste Management Specialist is responsible for overseeing the daily operations of the Solid Waste Gas Collection and Control System, embedded within three (3) landfills on site, serving customers and communities throughout Central and North-Central Wisconsin. The incumbent works directly with Marathon County Solid Waste operations staff to ensure an enclosed sanitary landfill system.

In addition, the Waste Management Specialist plays an integral role in the decision making process and coordination of all work at the site, provides leadership and guidance for operations staff, and helps others to understand the context of the regulations that must be followed. Landfills are very complex and constantly changing, thus, requiring critical thinking and decision making on a daily basis. Failure to properly manage the dynamics of the pollution control system can result in unsafe conditions, structural inability, and severe environmental contamination.

Final Recommendation: After reviewing the classification structure, and applying the Decision Band Method of Job Evaluation, it has been determined that the position's duties and responsibilities have increased to the level that is aligned with the existing Senior Maintenance Specialist classification (B23) which represents similar positions at Solid Waste with specialized knowledge, decision making and expertise in compliance and environmental health & safety. It is the recommendation of the Employee Resources Department to reclassify the Waste Management Specialist Classification from B22 to B23. This recommendation better aligns the position's responsibilities within the department and throughout the county classification system in a consistent and fair manner.

Reclassify the incumbent to Senior Maintenance Specialist, B23 effective 1/10/2021.

Employee	Current Rate	New Rate
Eric Olson	\$21.22	\$21.87

2021 Total Fiscal Impact: \$1,561

Submitted by Sue Fox and Boly Vang