



OFFICIAL NOTICE AND AGENDA-of a meeting of the County Board, Committee, Agency, Corporation or Sub-Unit thereof MARATHON COUNTY, WISCONSIN

MARATHON COUNTY HUMAN RESOURCES, FINANCE & PROPERTY COMMITTEE MEETING AGENDA

Date & Time of Meeting: **Monday, August 7, 2017; 3:00 p.m.**

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

Members: **Bill Miller, Chair; Craig McEwen, Vice-Chair; Tim Buttke, John Durham, Kurt Gibbs, John Robinson, E.J. Stark**

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.

1. Call to Order-Meeting called to order by Chairman Miller at 3:00 p.m., the agenda being duly signed and posted.
 - A. Please silence your cellphones.
2. Public Comment Period -- Not to Exceed 15 Minutes
3. Policy Issues Discussion and Committee Determination to the County Board for its Consideration
 - A. **Roll Call Vote to Go Into Closed Session** Pursuant to §19.85(1)(g), Wis. Stats., for the purpose of conferring with legal counsel for the governmental body who is rendering oral or written advice concerning strategy to be adopted by the body with respect to litigation in which it is or is likely to become involved – Matel/Attorney Wilson
 - B. Roll Call Vote to Return to Open Session

Open Session Reconvenes at Approximately 3:30 pm

- C. Possible Action or Announcements Resulting from Closed Session
4. Educational Presentations/Outcome Monitoring Reports
 - A. Update on 2018 Budget Process-Karger/Leonhard
5. Policy Issues Discussion and Committee Determination and Approval
 - A. Discussion and Possible Action-Tax Deed Land Sales, Possible Taking of Property and Changes to Tax Deed Parcels owned by the County:
 - 1) Tax Deed Sale
 - B. Approval of Claims and Questioned Costs-June 2017-Kordus
 - C. Discussion and Possible Action-Remnant Highway Land Sales, Review of Bids and Possible Sale of Parcel-Town of Rib Mountain-CTH R-Griesbach
 - D. Discussion and Possible Action-Proposal on Martin Luther King Holiday-(Follow up from May 15th meeting)-Karger/Robinson
 - E. Discussion and Possible Action-Marathon County Vehicle Registration Fee-FAQ and Fact Sheet-Karger
 - F. Discussion and Possible Action-Memorandum of Understanding/Contract to Provide Corporation Counsel Services to Lincoln County-Corbett
 - G. 2018 Reclassification and Job Evaluation Requests
Reclassification and Job Evaluation Requests-2018 Chart:
 - 1) **County Surveyor (34306)**, Cons/Planning/Zoning – Rebecca Frisch, CPZ Dir.
 - 2) **Admin. Coordinator (8100)**, Corporation Counsel – Scott Corbett, Corp. Counsel
 - 3) **Executive Admin. Coordinator (9002)**, County Administration – Brad Karger, County Admin.
 - 4) **Admin. Supervisor (11101)**, District Attorney – Theresa Wetzsteon, DA
 - 5) **Accounting Professional (13005)**, Finance – Kristi Palmer, Finance Dir.
 - 6) **Solid Waste Manager (27002)**, Solid Waste – Meleesa Johnson, Solid Waste Mgmt. Dir.
 - H. Discussion and Possible Action-2017 Human Resource and Finance and Property Meeting Locations
6. Policy Issues Discussion and Committee Determination to the County Board for its Consideration
 - A. Discussion and Possible Action-Resolution for the Central Wisconsin Airport Participation in Cooperative Purchasing-Kordus

- B. Discussion and Possible Action -2017 Interdepartmental Transfers-Kordus
- C. Discussion and Possible Action-Resolution Affirming Support for a Sixth Circuit Court Judge for Marathon County
- 7. Announcements: Next Meeting Date-August 28, 2017; County Board Assembly Room; 3 P.M.
- 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.

SIGNED /s/Bill Miller

Presiding Officer or Designee

Faxed to: Wausau Daily Herald
Faxed to: Record Review
Faxed to: Marshfield News
Faxed to: City Pages
Faxed by/time: K Palmer 8/4/17 2:45pm

NOTICE POSTED AT THE COURTHOUSE

By/Date/Time: K Palmer 8/4/17 2:45 pm

**FREQUENTLY ASKED QUESTIONS ABOUT THE
MARATHON COUNTY VEHICLE REGISTRATION FEE (WHEEL TAX)**

1. What is the Current Status of the Wheel Tax?

Ordinance #O-22-16, created Section 3.33 of the Marathon County General Code of Ordinances – Annual County Vehicle Registration Fee was passed by the Marathon County Board on August 23, 2016. Note: Although a supermajority is **not** necessary to adopt the ordinance, it passed with 29 aye votes, which represents more than a two-thirds majority of the entire membership. It requires only a majority of a quorum to be extended.

Under the authority of Wisconsin Statutes §341.35, Marathon County created a \$25 annual County vehicle registration fee from the users of highways, which is designated as a revenue source for highway maintenance in Marathon County.

The Ordinance became effective on December 1, 2016, with the provision that it will expire after 12 consecutive months unless extended by the Marathon County Board by specific action.

2. How Much is the Wheel Tax?

\$25.00 per vehicle

3. What Types of Vehicles are Subject to the Fee?

An automobile or a truck registered under 8,000 lbs. gross weight and customarily kept in Marathon County.

4. What Vehicles are Exempt?

- Buses, motorcycles, mopeds, motor homes, low-speed vehicles and trailers
- Trucks registered at more than 8,000 pounds or registered as Farm or Dual Purpose Farm
- Vehicles registered as Antique, Collector, Driver Education, Historic Military Vehicle, Hobbyist, Human Service Vehicle, Low-Speed Vehicle, Medal Of Honor, Municipal, State-owned, Special X and one vehicle with Ex-prisoner of war registration issued to any qualified individual
- Any vehicle with registration issued by a Wisconsin Indian tribe or band
- Vehicles displaying Dealer, Distributor, Finance Company or Manufacturer plates

5. Why are Some Vehicles Exempt?

State statutes limit which vehicles Marathon County can charge the fee on. Large trucks pay higher registration fees already. For example, the average dump truck pays \$1,700 - \$2,000 in registration fees, plus the cost of the fuel tax. The average logging truck pays about \$2,400 - \$2,500 in registration fees and fuel tax.

6. How Much Money Does the County Vehicle Registration Fee Raise?

It was anticipated in the 2017 budget that the vehicle registration fee would raise \$2,898,902. Actual receipts indicate that we have collected \$1,727,256.62 (for 7 months) from annual vehicle registrations, which is on target with our initial projections.

7. What is the Money Going to be Used For?

In 2017, all of the vehicle registration fees collected were allocated to bituminous resurfacing and bridge reconstruction. Registration fees accounted for 46% of the funding requested for these purposes (\$6,355,404).

$$2,898,902 / 6,355,404 = .4561$$

Wis. Stats. §341.35 (6r) mandates that the money *must* be used for “transportation related purposes”; it cannot and will not be used to pay other types of bills.

8. What Happens If the Vehicle Registration Tax Expires?

The 2018 budget will start with a 4.5 million dollar structural deficit:

- We have a 2 million dollar “cost to continue”, maintaining just the status quo in 2018, increase anticipated (employee compensation and benefits, utilities, commodity prices, out-of-home placements for children in need of protection, contracted services, out of county jail inmates, etc.) and the State property tax levy cap on operations will likely drive down our property tax rate again leaving us with ½ million dollars in new property tax revenues. (\$2,000,000 - \$500,000 = \$1,500,000 deficit)
- The elimination of the vehicle registration fees will add approximately 3 million dollars more to the structural deficit going into the 2018 budget. (\$1,500,000 + \$3,000,000 = \$4,500,000)

9. Why Do We Need the County Vehicle Registration Fee?

- A. The building and maintenance of highway and bridge infrastructure are essential to support commerce, public safety, tourism and safe transportation of people and goods.
- B. Needs in Marathon County:
 - **ROADS** - Currently 277 miles of our 611 county miles fall below our standard of a 7 out of 10 rating
 - **BRIDGES** - Currently 14 of our 110 bridges have a sufficiently rating below our goal of 50 out of a 100 rating
 - 2 of those bridges rate *Functionally Obsolete* according to federal standards
- C. Overall Cost to Pave a Road:
 - 1993, (last time federal gas tax was raised) was approximately \$75,000 per mile
 - 2006 (last time Wisconsin gas tax was raised) was approximately \$85,000 per mile
 - **2015 approximately \$208,000 per mile**
- D. Property tax appropriations and State transportation aids have not kept pace with the cost of labor and materials to support the county highway maintenance program.
- E. Wis. Stats. §341.35, gives Counties the authority to enact a flat registration fee. There are no other opportunities for the County to gain additional tax revenue as the State Government has capped property tax increases for operations at a level below our cost to continue and the County sales tax cannot exceed the 1/2 percent level that was enacted in Marathon County in 1988.

10. What Policies Can Address the Structural Deficit?

There only are a few options as we can't increase the property tax rate for operations and we can't increase the County sales tax:

- A. Borrow: We can borrow all or a portion of the 6.3 million dollars needed to fund our bituminous resurfacing and bridge repair program. The payments for that debt will be paid with property tax revenue, debt repayments are not included in the State imposed property tax levy constraints. Thus, if enacted, the net results to taxpayers will be a property tax increase.

Borrowed funds must be repaid over time with interest and this increases the project cost.

Other counties currently borrow for construction and maintenance of county highways. In fact, this practice is more common than Marathon County's current practice of funding these costs with operational dollars from property taxes. The State of Wisconsin has been borrowing to repair and rebuild aging roads with stagnant gas tax revenues for over a decade and now the resulting debt costs consumer 20 cents on every gas tax dollar.

We have the borrowing authority and such a practice will not damage Marathon County's excellent credit rating in the short term.

We can borrow to fund construction and maintenance of the County's 120 million dollar asset, the county highways and bridges, but eventually the repayments and the interest charges will catch-up with us, **making the current problem even worse**. The discussion we are currently having mirrors the current deadlock over the State budget. The Governor and Senate oppose raising highway user fees, choosing instead to increase borrowing or delay road projects; while Assembly leaders prefer some form of added revenue.

- B. Cut Programs and Services: Cutting programs and services will be painful and if not done carefully can make the County's fiscal health and wellness worse. Through the Priority Based Budgeting (PBB) process we now have all of Marathon County's programs assigned to priority quadrants:

- Quadrants 1 and 2 (Q1, Q2) representing our highest priority programs.
- Quadrant 4 (Q4) representing our lowest priority programs.

Department heads have been directed to analyze their Q4 programs and look for funds that can be transferred to higher priority programs (Q1, Q2) in need of additional resources. Our standing committees have been similarly tasked to look for opportunities to migrate funds toward our priorities and emerging needs. Washington County did this and they were able to migrate 1 million dollars out of Q4 over a period of two years. While this process is already underway, the Washington County example suggests that this process can help us cope with a portion of the structural deficit, but not the whole 4.5 million dollars. PBB is a proven tool that will benefit us more in the long-term (2-5 years) than in the short-term (2018).

There are non-mandated programs administered by non-profit agencies that enhance quality of life in Marathon County, protect vulnerable people, and boost the local economy that can be eliminated like:

Historical Society	\$54,376
The Women's Community	\$75,000
Partners for Progressive Agriculture	\$35,000
Community Action Program	\$33,757
Regional Planning	\$49,300

Healthy Teens Initiative	\$25,000
MCDEVCO	\$180,000
Wisconsin Valley Fair	\$20,000
Entrepreneurial Bootcamp	\$40,000

This option was talked about briefly during the 2017 budget presentation. The argument for cutting these funds was to let the non-profit agencies raise money in the community.

We also fund programs that augment or enhance state responsibilities:

- Restaurant Inspections
- Assistant District Attorneys
- Court Commissioner

The argument can be made that we need to focus our resources on County responsibilities and not fund these programs that support a State responsibility or provide a service that the state will provide, if we choose to opt out. The counter argument has been that not funding these programs and positions will be detrimental to public health and safety, as the State will not be quick to fill the gaps created.

There have been proposals in the past to cut Start Right and Aquatic Therapy and when the final budget was passed there was a lot of upset, but no funding reductions. The argument has been that these services are needed to prevent future social and physical health problems and the County Board has opted for the “pay me a little now” option over the “pay me a lot later” alternative.

No one knows how a discussion of program cuts will end up. The paragraphs above are intended to illustrate the types of the discussions County Supervisors and staff have had in the past when program reductions were explored. Every program that has been proposed for reduction has a constituency group that supports it and a solid argument about how it contributes to health, safety and/or economic prosperity of Marathon County.

C. Extend the County Vehicle Registration Tax (\$25)

Continuing the County Vehicle Registration Fee is not a popular option, but neither are any of the other options. The benefits of extending the registration tax are:

- The money must be used for transportation related purposes. This is required by State Statute.
- The administrative cost of collecting the fee is extremely low. Currently Wisconsin Department of Transportation charges a per vehicle fee of 17 cents, which amounts to less than \$20,000 in total administration costs across the county, far less than the costs that would be associated with borrowing for roadway maintenance.
- It is the only option available to Marathon County to raise new revenues.

D. Deferred Maintenance

There is no requirement that roads and bridges be maintained consistent with County policies. Bridges represent more of a direct safety hazard so postponement of maintenance

can only be minimal, but highway repair, rehabilitation and reconstruction can be postponed and early on the impact of such a policy will not be obvious. The problem with deferred maintenance is:

- It will shorten the service life of our public infrastructure.
- It can threaten traffic safety.
- We will lose the savings associated with preventative maintenance.

Deferring highway road maintenance is a lot like not having standard maintenance done on your car. Sure, you will save money by not changing your oil in your car during year one and maybe year two, but will you have really saved any money when you look back in year five or year ten?

11. Can Marathon County Share this Revenue with Other Municipalities?

The Wisconsin Constitution requires that taxation be uniform. One of the basic guarantees of uniformity is the principle that the unit of government that imposes a tax must also be the unit of government that spends the tax proceeds. See, Authority to Tax in Wisconsin, 44 *Marq. L. Rev.* 457, 1994

It is also important to note that while the legislature has provided direct authority to enact a registration fee, it has provided absolutely no authority for the county to exempt vehicles from particular municipalities and no authority to distribute proceeds from the taxes collected to other municipalities.

Initial Draft Created

By Brad Karger on July 26, 2017

Edits and updates subsequently added by
Jim Griesbach, Scott Corbett, Kristi Palmer,
and Lance Leonhard

MARATHON COUNTY HUMAN RESOURCES AND FINANCE AND PROPERTY COMMITTEE MEETINGS 2017 Schedule

Monday, January 9	3:00 p.m.	County Board Assembly Room
Monday, January 30	3:00 p.m.	County Board Assembly Room
Monday, February 13	3:00 p.m.	County Board Assembly Room
Monday, February 27	3:00 p.m.	County Board Assembly Room
Monday, March 13	3:00 p.m.	County Board Assembly Room
Monday, March 27	3:00 p.m.	County Board Assembly Room
Monday, April 3	3:00 p.m.	County Board Assembly Room
Monday, April 17	3:00 p.m.	County Board Assembly Room
Monday, May 1	3:00 p.m.	County Board Assembly Room
Monday, May 15	3:00 p.m.	County Board Assembly Room
Monday, June 5	3:00 p.m.	County Board Assembly Room
Monday, June 26	3:00 p.m.	County Board Assembly Room
Monday, July 17	3:00 p.m.	County Board Assembly Room
Monday, August 7	3:00 p.m.	County Board Assembly Room
Monday, August 28	3:00 p.m.	Employee Resources Conference Room
Monday, September 18	3:00 p.m.	Central Wisconsin Airport- Marathon County Finance Committee Meeting
	5:00 p.m.	Central Wisconsin Airport- Joint Portage/Marathon County Airport Meeting
Monday, October 2	3:00 p.m.	County Board Assembly Room
		2018 Budget Meeting
Monday, October 16	3:00 p.m.	County Board Assembly Room - 2018 Budget Meeting
Monday, November 6	3:00 p.m.	County Board Assembly Room
Monday, November 20	3:00 p.m.	County Board Assembly Room
Monday, December 11	3:00 p.m.	County Board Assembly Room



COUNTY BOARD MEETINGS

2017 Schedule

Thursday, January 19	7:00 p.m.	Educational Meeting	Courthouse Assembly Room
Tuesday, January 24	7:00 p.m.	Regular Meeting	Courthouse Assembly Room
Thursday, February 9	7:00 p.m.	Educational Meeting	Courthouse Assembly Room
Tuesday, February 14	7:00 p.m.	Regular Meeting	Courthouse Assembly Room
Thursday, March 23	7:00 p.m.	Educational Meeting	Courthouse Assembly Room
Tuesday, March 28	7:00 p.m.	Regular Meeting	Courthouse Assembly Room
Thursday, April 13	7:00 p.m.	Educational Meeting	Courthouse Assembly Room
Tuesday, April 18	7:00 p.m.	Organizational Meeting	Courthouse Assembly Room
Thursday, May 11	7:00 p.m.	Educational Meeting	Courthouse Assembly Room
Tuesday, May 16	7:00 p.m.	Regular Meeting	Courthouse Assembly Room
Thursday, June 15	7:00 p.m.	Educational Meeting	Courthouse Assembly Room
Tuesday, June 20	7:00 p.m.	Regular Meeting	Courthouse Assembly Room
Thursday, July 13	7:00 p.m.	Educational Meeting	Courthouse Assembly Room
Tuesday, July 18	7:00 p.m.	Regular Meeting	Courthouse Assembly Room
Thursday, August 17	7:00 p.m.	Educational Meeting	Courthouse Assembly Room
Tuesday, August 22	7:00 p.m.	Regular Meeting	Courthouse Assembly Room
Thursday, September 14	7:00 p.m.	Educational Meeting	Courthouse Assembly Room
Tuesday, September 19	7:00 p.m.	Regular Meeting	Courthouse Assembly Room
Thursday, October 12	7:00 p.m.	Educational Meeting	Courthouse Assembly Room
Tuesday, October 17	7:00 p.m.	Annual Meeting	Courthouse Assembly Room
Tuesday, November 14	8:00 p.m.	Budget Hearing	Courthouse Assembly Room
Thursday, November 16	7:00 p.m.	Regular Meeting	Courthouse Assembly Room
Tuesday, December 19 (only one meeting in December)	7:00 p.m.	Edu. & Regular Meeting	Courthouse Assembly Room

Meeting times are subject to change by order of the County Board Chair, pursuant to County Board Rule 2.01(1).

Position: County Surveyor

COMMENTS:

The position is currently rated B24.

The County Surveyor manages, administers and implements the surveying program for the County, administers and implements County's surveying ordinance, enforces violations of code, develops code language and code revisions.

We have examined the essential duties of the position and have classified the position using the Decision Band™ Method (DBM). The job evaluation shows the following:

Highest Banded Task: C4
Number of Highest Banded Tasks: 3/5 responsibility areas
Percent of Time on High Banded Tasks: 30-40%
Degree of Difficulty/Diversity: Medium

The position performs tasks that require "processing" decision making. Such duties include: developing, overseeing, and maintaining survey records library and database; assigning and prioritizing work, monitoring quality of work performed by survey technician; administering Land Division and Surveying Ordinance by reviewing maps and plats, analyzing and updating the ordinance, investigating potential violations, and determining enforcement method; completing records, surveys, and maps. Decisions made at this level are subject to the limits imposed by the available technology and resources and to the constraints set by higher-level management.

The position receives a sub-grade of two (2), because of the medium complexity and diversity of C4 tasks in relation to other jobs in the same band. Thus, the correct evaluation of this position is C42.

Position
Department

County Surveyor
Conservation, Planning & Zoning

Reclassification/Pay Grade Adjustment
Effective 01/01/2018

FTE % 100.00%
Annual Hours 2080
Incumbent Christopher Fieri
7/31/2017 \$24.70

Current Class, DBM & Hourly Rate: County Surveyor (5122), B24

Item	2018 Proposed Rates	Budget Impact \$24.70	Minimum \$20.61	Mid-Point \$24.22	Maximum \$27.83
DBM B24		\$51,376	\$42,869	\$50,378	\$57,886
FICA Retirement/Medicare Rate	7.65%	\$3,930	\$3,279	\$3,854	\$4,428
Retirement - Employer	6.70%	\$3,442	\$2,872	\$3,375	\$3,878
Worker's Comp - Municipal	4.20%	\$2,158	\$1,800	\$2,116	\$2,431
Unemployment Insurance	0.15%	\$77	\$64	\$76	\$87
Estimated Salary + Benefits (1)		\$60,983	\$50,884	\$59,799	\$68,710

Proposed Class, DBM & Hourly Rate Effective 1-1-2018: County Surveyor (5122), C42

Item	2018 Proposed Rates	Budget Impact \$27.70	Minimum \$25.58	Mid-Point \$30.69	Maximum \$35.81
DBM C42		\$57,616	\$53,206	\$63,835	\$74,485
FICA Retirement/Medicare Rate	7.65%	\$4,408	\$4,070	\$4,883	\$5,698
Retirement - Employer	6.70%	\$3,860	\$3,565	\$4,277	\$4,990
Worker's Comp - Municipal	4.20%	\$2,420	\$2,235	\$2,681	\$3,128
Unemployment Insurance	0.15%	\$86	\$80	\$96	\$112
Estimated Salary + Benefits (1)		\$68,390	\$63,156	\$75,772	\$88,413
Estimated Increase		\$7,407	\$12,273	\$15,974	\$19,702

(1) Mandated Fringe Benefits Tied to Salary (FICA, WRS, WC, UE)

Rev. 7/31/2017

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: Christopher L. Fieri

Your Supervisor's Name: David Mack

Your Division: Land Services

Your Department: Conservation, Planning, and Zoning

Your Current Classification: County Surveyor

- 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: Planning Analyst C42 DBM Rating

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 job duties and responsibilities of the County Surveyor have changed since the last PDQ review.

Managing contracted surveying services has become a larger part of the position duties. These are large remonumentation projects which have required a substantial amount of time using higher level decision making skills.

Although the last PDQ mentions making amendments to the Land Division Ordinance, the County Surveyor position has been co-leading a complete revision of the ordinance. Working with and educating local municipalities within Marathon County about land division will be another ongoing responsibility of this position and will be crucial in the effectiveness of the ordinance.

These are a few examples of the changes that have occurred in this position, but the responsibilities of managing the surveying office and constantly improving efficiency and functionality will be an ongoing process.

I believe the requested Planning Analyst classification better reflects the level of decision making and responsibilities that are involved with this position.

Christopher L. Fieri

Christopher L. Fieri

4/28/2017

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 County Surveyor's position duties have increased and become more complex than when the original PDQ was established. The increased responsibilities in the revision of the updated Land Division Ordinance has and will continue to include more work with the municipalities in the County and the oversight of how lands are divided in the County.

The substantial increase in job duties is in the leadership oversight of the accelerated remonumentation program and dissemination of grant funds to contracted surveyors. The oversight of this program now involves a higher level of decision making in creation of the RFP, awarding contracts, developing standards, and ultimately the quality control measures for the program. This has all developed since the previous PDQ was completed.



David Mack

4/28/2017

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 county surveyor responsibilities have expanded from mostly technical work to more program administrative work. The administrative work is performed independently with little supervision and direction from the manager. Due to the specific nature of the program, the surveyor coordinates all facets of program administration which involves a higher level of decision making. Historically, the classification of this position has been questioned and we would appreciate a current evaluation and discussion of both the PDQ and the comparables with other counties.

<i>Rebecca J. Frisch</i>	<u>Rebecca J. Frisch</u>	<u>4/28/2017</u>
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

DUE: April 30 to your Supervisor

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>Christopher L. Fieri</u>	Date Form Completed: <u>April 24, 2017</u>
Official Job Title: <u>County Surveyor</u>	Department: <u>Conservation, Planning, and Zoning Dept.</u>
Work Phone: <u>715-261-6026</u>	Site: <u>210 River Drive Wausau, WI 54403</u>
E-mail: <u>christopher.fieri@co.marathon.wi.us</u>	Time in Current Position: <u>2 years 4 Months</u>
<u>Immediate Supervisor:</u>	<u>Immediate supervisor reports to:</u>
Name: <u>David Mack</u>	Name: <u>Rebecca Frisch</u>
Title: <u>Program Manager</u>	Title: <u>Department Head</u>
Work Phone: <u>715-261-6043</u>	Work Phone: <u>715-261-6024</u>
E-mail: <u>Dave.Mack@co.marathon.wi.us</u>	E-mail: <u>Rebecca.Frisch@co.marathon.wi.us</u>

2. POSITION SUMMARY- This is very important.

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

The County Surveyor is the officer of the Wisconsin State Constitution responsible for the establishment and maintenance of all U.S. Public Land Survey System (PLSS) corners in the county per statute and administrative codes. This position manages, administers, and implements the surveying program for the county, allocates funds pertaining to said program, and leads and schedules work for employees working within the surveying program. This position is responsible for administration and implementation of the county's land division and surveying ordinance including approving and/or denying all private and public land divisions within the county's jurisdiction. The county surveyor enforces any violations of the code, develops code language, and implements revisions. Duties include engaging town officials, citizens and private surveyors to develop code language, implement code revisions, respond to violations, and educating the groups in regards to the code. As part of the administration of the surveying program, this position oversees and performs any official mapping requirements for the county by analyzing and providing data, evaluating legal documents, and instructing others regarding every property and public right-of-way in the county.



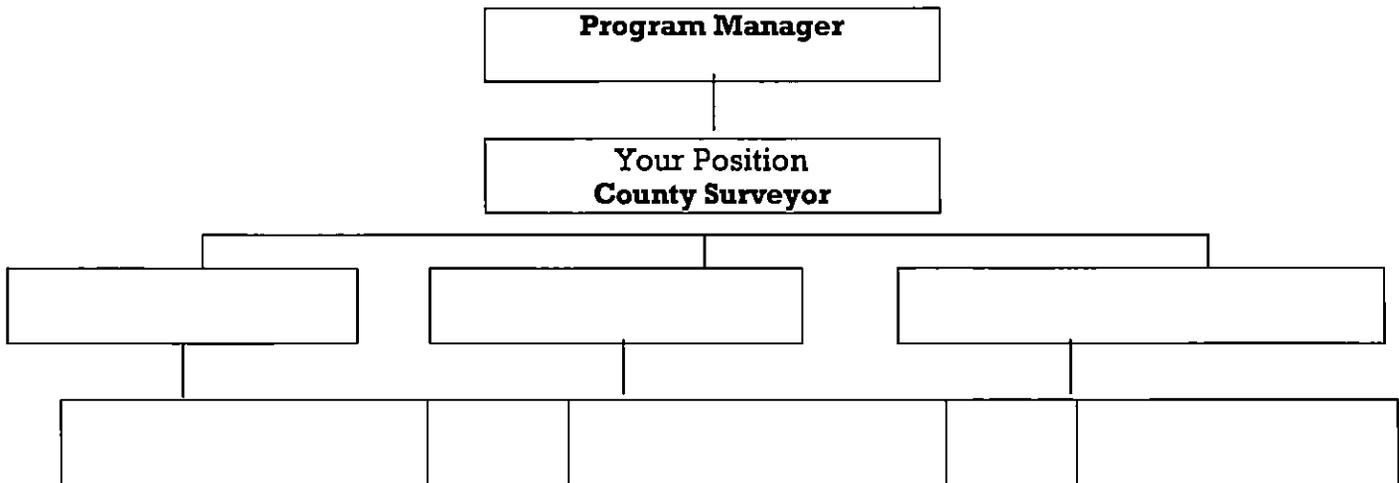
3. SUPERVISORY RESPONSIBILITIES – This is very important.

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 checked="" type="checkbox"/>	I provide work direction to and review the work of student workers, temporary and/or contract employees.	1	1

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)			
1. Surveying Program Administration ➤ Public Land Survey System maintenance per state statute and administrative code. ➤ Develop, oversee and maintain survey records library and databases ➤ Schedules and monitors quality of work being performed by the survey technician	Decide which areas of the county have priority for survey monument maintenance work. Determine methods to store and provide access to the records more efficiently (hard copy and electronically). Evaluate and determine which tasks to assign to technician based on priority, deadlines, and level of responsibility.	Daily	35%

	<p>Evaluate program performance and recommend changes in procedure to management and committees.</p> <p>Provide guidance to private surveyors and provide legal determinations that affect the locations of properties in the county.</p> <p>Determine program goals and objectives and how to implement program goals and objectives the most effective and efficient ways to ensure timelines/deadlines are met.</p> <p>Determine how to allocate funds to keep materials inventory stocked and prioritizing contracted work through the allocated county funding.</p>		
<p>2. Land Division and Surveying Ordinance Administration</p> <ul style="list-style-type: none"> ➤ Certified Survey Map Review ➤ Subdivision Plat Review ➤ Analyzing and Amending the Land Division and Surveying Ordinance ➤ Attending Land Conservation and Zoning meetings to guide the committee through the plat review 	<p>Develop and implement processes for private surveyors to follow for efficiency in the review of Certified Survey Maps and Subdivision Plats.</p> <p>Analyze, evaluate, and approve or deny survey maps in determining compliance with the Land Division and Surveying Ordinance.</p> <p>Investigate potential violations, if a violation has occurred, determine which enforcement method to utilize and follow-up with enforcement including</p>	<p>Daily</p>	<p>30%</p>



<p>process and make recommendations</p>	<p>coordinating with corporation counsel, until compliance is achieved.</p> <p>Identify inconsistencies in codes that do not meet current standards, revise and recommend modifications and amendments of codes to appropriate county committees and ultimately county board for revision.</p> <p>Communicate clearly and concisely technical information to people of all levels of understanding concerning land division.</p> <p>Document and determine if a referral for disciplinary action, to the State licensing board, is needed for a surveyor that is not following regulations.</p>		
<p>3. Complete drafting of PLSS records, surveys, and township maps</p> <ul style="list-style-type: none"> ➤ Drafting tie sheets, section summaries, township maps, and plats of survey 	<p>Determine the use of information for mapping and how to portray information in an efficient and orderly fashion.</p> <p>Develop drafting standards for consistency in mapping.</p>	<p>Daily</p>	<p>20%</p>
<p>4. Managing contracted survey work</p> <ul style="list-style-type: none"> ➤ Develop Request for Proposals for all contracted projects to ensure a quality product and compliance with all local, state, and federal standards. 	<p>Determine location, scale, scope, and standards of contracted projects.</p> <p>Prepare, submit, request, review, and approve proposals for contracted remonumentation work.</p> <p>Evaluate proposals to determine the contractor and</p>	<p>Weekly</p>	<p>10%</p>



	<p>award the contract.</p> <p>Determine and prepare necessary documentation for grant funding of contracted survey work.</p> <p>Determine quality control measures and how to implement them.</p> <p>Approve final work for payment.</p>		
<p>5. Performing property surveys for other county departments</p>	<p>Decide on boundary locations by comparing found monument evidence in the field with the hierarchy of evidence.</p> <p>Determine which procedures to use to obtain the highest standards in survey work while being as efficient as possible.</p>	<p>Monthly</p>	<p>5%</p>

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. Extensive knowledge in the Principals and Practices of Land Surveying
2. Skills in Computer Aided Drafting Software and Geographical Information Systems Software
3. Extensive knowledge in Trigonometric, Geometric, and Algebraic mathematics
4. Knowledge in Legal Issues and Case Law pertaining to boundaries
5. Extensive independent judgement and situational reasoning skills
6. Possess a high level of interpersonal communication skills
7. Knowledge in Civil Engineering
8. Skills in operating Global Positioning Systems (GPS) and other technical surveying instruments
9. Knowledge of Federal, State, and Local regulations and the skill to interpret them
10. The skill of communicating technical information clearly and concisely to people of all levels of knowledge both verbally and in writing



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?

Land Surveying Science, Civil Engineering, Geographical Science, Geometric and Trigonometric Mathematics, Geographic Information Systems.

8. EXPERIENCE - This is very important.

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

	Minimum Time Required	
Land Surveying	10	years
Drafting, Computer Aided	7	years
Civil Engineering	1	years

9. SPECIAL REQUIREMENTS:

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

Do not use acronyms.

Registered Professional Land Surveyor with the State of Wisconsin with 20 hours of Continuing Education every two years.

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%
Dual Frequency/Real-Time Kinematic Global Positioning System and software	Frequently > 50%
Robotic Total Station (laser precision angle/distance measuring device)	Moderately 25% - 50%
Computer Aided Drafting (CAD) Software and Trimble Business Center Software	Frequently > 50%
All-Terrain Vehicle (ATV)	Infrequently <10%
Gas-Powered Breaker/Driver	Seldom 10% - 25%

11. DECISION-MAKING & JUDGMENTS.

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

1. This position is responsible for the review of Certified Survey Maps (CSMs) that are prepared by private sector surveyors in accordance with the work they have done for individual property owners who are within the county's jurisdiction. The County Surveyor must interpret the state statutes and the county's land division ordinance and decide if the CSM is in compliance with all technical and procedural standards. Once a determination has been made that a map is not in compliance, a judgement must be made on the best way to alleviate the problem and the most appropriate way to present it to the surveyor. This is also the case with any land division violations that occur within the county's jurisdiction. The County Surveyor must determine the extent of the violation and decide whether to issue a citation or just work with the individual to bring the violation into compliance.
2. While performing boundary surveys, countless decisions are made related to what evidence to hold and what procedures to implement to establish the survey corners, all of which ultimately affect people's real property. These decisions are made regularly and independently by the county surveyor. Additionally, prioritizing workload and adjusting schedules are common decisions that this position is faced with on a daily basis. Schedules are constantly being adjusted to accommodate colleagues within our organization, the general public, and the private surveyors that work in the area (all of which are highly dependent upon the services that the surveying program provides). Decisions made on which office work has priority are based upon deadlines indicated by individuals and the effort to keep the private surveyor's project timelines on schedule. Office days are determined by workload and deadlines. Field days are based on office workload and weather conditions, and then a determination needs to be made as to what field work has priority.

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 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.	Seldom 10%-25%	0--Not Important
Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces.	Moderately 25% - 50%	2--Very 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.	Seldom 10% - 25%	1--Somewhat Important
Crouching: Bending the body downward and forward by bending leg and spine.	Seldom 10% - 25%	1--Somewhat Important
Crawling: Moving about on hands and knees or hands and feet.	Infrequently <10%	0--Not Important
Reaching: Extending hand(s) and arm(s) in any direction.	Moderately 25% - 50%	1--Somewhat 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.	Moderately 25% - 50%	1--Somewhat Important
Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.	Moderately 25% - 50%	3--Extremely Important
Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position.	Moderately 25% - 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.	Moderately 25% - 50%	3--Extremely Important
Grasping: Applying pressure to an object with the fingers or palm.	Moderately 25% - 50%	2--Very 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%	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.	Moderately 25% - 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.)	Seldom 10% - 25%
<input checked="" type="checkbox"/>	Extreme temperatures	Infrequently <10%
<input type="checkbox"/>	Inadequate lighting	Select
<input type="checkbox"/>	Work space restricts movement	Select
<input checked="" type="checkbox"/>	Intense noise	Seldom 10% - 25%
<input checked="" type="checkbox"/>	Travel	Seldom 10% - 25%
<input checked="" type="checkbox"/>	Environmental (disruptive people, imminent danger, threatening environment)	Moderately 25% - 50%

14. ADDITIONAL COMMENTS

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

The duties of the County Surveyor have evolved over time which has created additional responsibilities. Recently, the state has provided grant funding for remonumentation projects which has accelerated remonumentation efforts in Marathon County and is directly overseen and managed by the County Surveyor. This additional work includes drafting the Request for Proposal, evaluating responses, awarding the contract, developing the standards of the work to be done, and the implementation of checks and balances for quality control.

In addition, the County Surveyor is responsible for evaluating the effectiveness of the land division ordinance as it relates to current surveying practices and changes in state and federal regulations. This evaluation and assessment is complex and ongoing. Upon documentation of the issues that our ordinance either does not cover or has not regulated properly, solutions to these issues have to be developed and drafted into the ordinance. All modifications are then presented to a work group consisting of local surveyors and town officials for their comments and feedback. The draft ordinance also needs to be presented to the Land Conservation and Zoning (LCZ) committee so they can make their recommendation to the county board to adopt the ordinance. Meetings will need to be scheduled with all town officials within the county to educate them on the significance of the ordinance and the need for their involvement in the land division process.

Another aspect of the position, that is absolutely necessary, is the involvement in the local chapter and state society of the land surveying profession. This requires a fair amount of time outside of work, but is essential in knowing what changes are occurring in regulation or in our profession. The efforts of the society promote the profession through outreach, provide educational opportunities for surveyors and the general public, and encourage its members to become involved in their



communities. Currently, I am the Central Chapter Representative for the Wisconsin Society of Land Surveyors which requires me to attend state society board meetings. I relay information relating to surveying from the meetings to the local surveyors which helps them stay current with practices and regulation resulting in better surveying in the area. The time spent with the local surveyors also builds trust and comradery. This is essential to the County Surveyor position as I am highly involved in reviewing and critiquing their work.

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: Christopher L. Fien Date: 4/28/2017

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
14	<p>A. The primary changes to this position have occurred with the leadership and management of the state's accelerated remonumentation program and the dissemination of the associated grant funds. The Surveyor now directly oversees the RFP, awarding of contracts, and developing standards and quality control measures for the projects.</p> <p>B. The Surveyor now has more responsibility in relating the revised Land Division Ordinance to current surveying practices. The Surveyor will work more closely with the municipalities to ensure</p>

	proper education and compliance with the ordinance.

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: *Paul Munk* Date: 4/28/2017

Department Head Signature: *Rebecca J. Frisch* Date: 4/28/2017

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

Employee Signature: *Christopher L. Frim* Date: 4/28/2017

Position: Administrative Coordinator

COMMENTS:

The position is currently rated B23.

The Administrative Coordinator provide comprehensive and specialized administrative support for the Corporation Counsel department, such as assigning and prioritizing work; preparing, editing and reviewing legal documents, letters, and reports; communicating and coordinating work with other departments regarding operational process and procedures.

We have examined the essential duties of the position and have classified the position using the Decision Band™ Method (DBM). The job evaluation shows the following:

Highest Banded Task: B2

Number of Highest Banded Tasks: 16/18 responsibility areas

Percent of Time on High Banded Tasks: 80-90%

Degree of Difficulty/Diversity: High

The position performs tasks that require "operational" decision making. Such duties include: organizing, prioritizing projects, tasks for the department; coordinating schedules and deadlines; maintaining department calendars; preparing, editing, and reviewing a variety of legal documents; organizing and maintaining files. Overall, this position has responsibilities that allow for the incumbent to determine how and when to carrier out an operation, but not as to what operations constitute the process.

The position receives a sub-grade of four (4), because of the low complexity and diversity of B2 tasks in relation to other jobs in the same band. Thus, the correct evaluation of this position is B24.

Position
Department

Administrative Coordinator
Corporation Counsel's Office

Reclassification/Pay Grade Adjustment
Effective 01/01/2018

FTE % 100.00%
Annual Hours 2080
Incumbent Phyllis Simon
7/31/2017 \$20.32

Current Class, DBM & Hourly Rate: Administrative Coordinator (5023), B23

		2018 Proposed Rates	Budget Impact \$20.32	Minimum \$18.78	Mid-Point \$22.06	Maximum \$25.35
Item						
DBM B23			\$42,266	\$39,062	\$45,885	\$52,728
FICA Retirement/Medicare Rate	7.65%		\$3,233	\$2,988	\$3,510	\$4,034
Retirement - Employer	6.70%		\$2,832	\$2,617	\$3,074	\$3,533
Worker's Comp - clerical	0.23%		\$97	\$90	\$106	\$121
Unemployment Insurance	0.15%		\$63	\$59	\$69	\$79
Estimated Salary + Benefits (1)			\$48,491	\$44,816	\$52,644	\$60,495

Proposed Class, DBM & Hourly Rate Effective 1-1-2018: Exec. Admin. Coordinator (5025), B24

		2018 Proposed Rates	Budget Impact \$21.34	Minimum \$20.61	Mid-Point \$24.22	Maximum \$27.83
Item						
DBM B24			\$44,387	\$42,869	\$50,378	\$57,886
FICA Retirement/Medicare Rate	7.65%		\$3,396	\$3,279	\$3,854	\$4,428
Retirement - Employer	6.70%		\$2,974	\$2,872	\$3,375	\$3,878
Worker's Comp - clerical	0.23%		\$102	\$99	\$116	\$133
Unemployment Insurance	0.15%		\$67	\$64	\$76	\$87
Estimated Salary + Benefits (1)			\$50,926	\$49,183	\$57,799	\$66,412
Estimated Increase			\$2,436	\$4,366	\$5,155	\$5,917

(1) Mandated Fringe Benefits Tied to Salary (FICA, WRS, WC, UE)

✓

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: Phyllis G. Simon

Your Supervisor's Name: Scott M. Corbett, Corporation Counsel

Your Division: N/A

Your Department: Corporation Counsel

Your Current Classification: Administrative Coordinator 5023/B23

- 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: 5025/B24 Classification

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:

Please see the attached PDQ supporting reclassification to Confidential Administrative Specialist.

Use additional sheets if necessary

Phyllis G. Simon
Employee Signature / Phyllis G. Simon

April 27, 2017
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:



Immediate Supervisor Signature / Scott M. Corbett

4/28/17
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:



Department Head Signature / Typed Name

4/29/17
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: Phyllis G. Simon Date Form Completed: April 27, 2017

Official Job Title: Administrative Coordinator Department: Corporation Counsel

Work Phone: (715) 261-1139 Site: Corporation Counsel Office

E-mail: phyllis.simon@co.marathon.wi.us Time in Current Position: 10 years and 3 months

Immediate Supervisor:

Immediate supervisor reports to:

Name: Scott M. Corbett Name: Lance Leonhard

Title: Corporation Counsel Title: Deputy County Administrator

Work Phone: (715) 261-1128 Work Phone: (715) 261-1401

E-mail: scott.corbett@co.marathon.wi.us E-mail: lance.leonhard@co.marathon.wi.us

 **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 provide advanced and specialized administrative duties in support of the Corporation Counsel department for **five** attorneys and one paralegal. I primarily work for the department head/Corporation Counsel attorney who represents the county in litigation, enforcement, county board matters, etc. I provide specialized knowledge and independent judgment. I communicate and schedule with all other county departments (Sheriff's Department, Department of Social Services, Health, etc.), and citizens in the community. I gather information as assigned, prioritize tasks, report tasks, and assign tasks as directed, preparing and reviewing legal documents, editing and formatting documents, letters and reports; manage the office procedure binder, stay updated as to county policies and procedures.



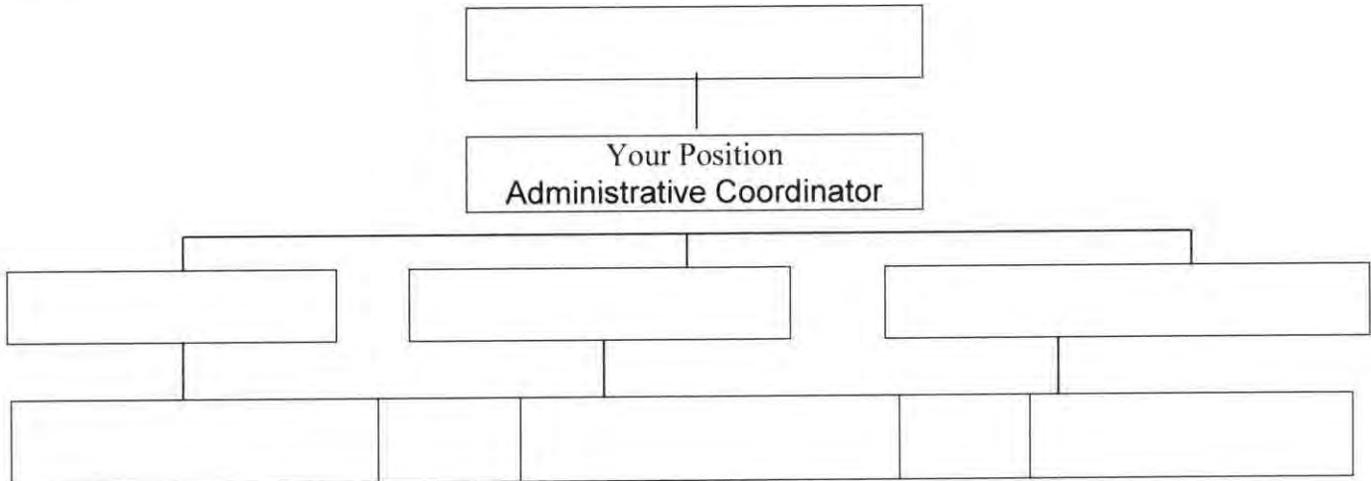
3. SUPERVISORY RESPONSIBILITIES – This is very important.

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.	NA	

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>
<p>1. Organize, maintain, modify and prioritize the project/task list and files and work together with the Corporation Counsel attorney to meet the many needs of customers (department heads, agencies within and without the organization, and the public).</p> <p>Use this information to identify measurable goals and realistic job deliverables by the Office of Corporation Counsel.</p> <p>An Excel spreadsheet is updated and is viewable on the</p>	<p>What are the relevant facts and which task/project requires first priority?</p> <p>What actions/tasks need to be completed to proceed successfully?</p> <p>What time constraints exist (statutory, local or calendar availability)-under the direction of the attorney and/or experience?</p> <p>Have all applicable materials been referred to the Office of Corporation Counsel for review and consideration?</p>	Daily	10%



<p>“O” Drive.</p> <p>Frequent memorandums to go to the Corporation Counsel attorney and Deputy County Administrator which maps out progress and/or completion of those tasks at hand.</p> <p>Independently communicate with requesting agencies to continue deadlines and schedule meetings and phone conferences to meet those deadlines.</p> <p>Work with attorneys to gauge project task list from activation to completion.</p>	<p>What follow up is necessary? How can we effectively accommodate or manage time constraints in an environment of high volume of cases proceeding simultaneously?</p> <p>What issues can be anticipated and how can I best assist attorneys within the office to accomplish their goals in completion of these tasks/projects?</p> <p>Requested Active 100% Complete 10% to Complete 20% to Complete 30% to Complete 40% to Complete 50% to Complete?</p> <p>What areas of file management, recordkeeping, and legal activity are appropriate for modification?</p> <p>How best to coordinate with fellow office employees and community and legal partners to modify/update/improve file management, organization, communication interaction with community and legal partners?</p>	<p>Daily</p> <p>Daily</p>	<p>1%</p> <p>1%</p>
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2. Retrieve confidential information relating to warrants and quashed warrants through the use of Laserfiche and port into the Sheriff's Department and Clerk of Courts Office.		Occasionally	1%
3. Continue to observe and investigate software programs for use in the office (i.e., contract writing).		Daily	10%
4. . Maintain the office credit card.	Is all information from the Finance Department Report in line with vendor information?	Occasionally	1%
5. Continue to adhere to record retention policies and procedures outlined by attorneys to close out and file confidential juvenile CHIPS, mental commitment cases, termination of parental rights cases, civil opinions, agendas and minutes, and other work products of the office to maintain organization. (I have started a Microsoft Access Database on the "O" Drive and placed data sheets sheets in a binder for staff members that do have have Microsoft Access). Also continue to work on file management or methods such as Laserfiche starting with the Juvenile CHIPS cases for greater efficiency and space.	What are the identifiers in (i.e., age of youngest child) that are to be reviewed in order to close out and meet with statutory and office procedures? What is the best way to identify/label/communicate and maintain clarity and confidentiality as to where this information is stored and maintained?	Daily	10%



<p>6. Type from dictation Court of Appeals Briefs, gather and copy attachments; develop a table of contents and certifications; put the briefs together; scan and e-mail briefs to the Clerk of Court of Appeals in Madison in a timely manner, plus mail the hard copies to the Clerk of Appeals/Supreme Court in Madison and other parties.</p>	<p>Know the rules for e-filing the brief and mailing hard copies to the Clerk of Court of Appeals in Madison; be sure the cover page of the brief is accurate.</p> <p>Check pagination and indexing for accuracy.</p>	<p>Occasionally</p>	<p>1%</p>
<p>7. Using the Microsoft Office Calendar, maintain leave requests for the entire office in the shared PTO Calendar and input any reservation requests of our conference room.</p>	<p>What is the best way to communicate with office staff to accomplish clarity and PTO requests received and to be successful in the building of office relationships.</p>	<p>Daily</p>	<p>10%</p>
<p>8. Garnishments</p>	<p>Keep database in Microsoft Access and know what the timelines exist in answering garnishments.</p> <p>Does the debtor have a pending garnishment?</p> <p>Gather payroll information from the financial report provided by the Payroll Department.</p> <p>Does the person pay child support?</p> <p>Calculate (use the formula on our garnishment form) to calculate what is</p>	<p>Occasionally</p>	<p>1%</p>

	<p>allowed by statute for garnishment of wages.</p> <p>Is there a bankruptcy pending?--knowing how to electronically find that information out.</p> <p>What is the next payroll period for the deduction in which the garnishment will begin?</p> <p>How many copies and to who gets the response to garnishment.</p> <p>Prepare a cover letter to go with the garnishment.</p>		
9. Generate and maintain an Employee Report Form and other employee relation matters, set up and work with Social Services any applications needed to access the Wisconsin CCAP System or child support website, maintain and keep track of computer access and any computer waiver forms needed by Information Services or changes.	<p>What are the identifiers needed?</p> <p>What are the payroll processing codes and timelines and where to access that data?</p>	Occasionally	1%
10. Budget	<p>Which reports and how to generate financial reports in Cayenta (financial software system).</p> <p>Is the report for revenue, for expenses or budget information?</p> <p>Knowing the Cayenta (financial software system).</p> <p>What is the budget</p>	Select	1%



	<p>deadline?</p> <p>What is the amount in each appropriation unit?</p> <p>What is our payroll costs?</p> <p>What are the staff needs or requests of the Corporation Counsel Department?</p> <p>What are the basic financial terms?</p> <p>What specific GL Codes are used to invoice each line-by-line item?</p>		
11. Reimbursement Forms	<p>What is the GL Code for each line item?</p> <p>What is allowable per diem for meals and other expenses?</p> <p>what is the vehicle insurance requirement and at what rate of reimbursement is allowed by the county?</p> <p>Who has submitted vehicle insurance information and what are the policy limits?</p>	Occasionally	1%
12. Serve as backup to the child support administrative coordinator.	<p>Navigate and be able to utilize KIDS program for production of documents and reports.</p> <p>Adhere to department policy and procedures and relating statutes for the service of process.</p>	Weekly	3%

	<p>What are these pleadings being filed under? Paternity, establishment, etc.</p> <p>How to read and print reports as to the financials and a history of a case out of the KIDS.</p>		
<p>13. Other duties as assigned.</p> <p>14. Track and Manage Time Studies for Corporation Counsel staff which then are sent to Social Services/Child Support for reimbursement. Also, track billable guardianship hours for reimbursement.</p> <p>15. Inventory and purchase supplies needed and organize the supply cabinet.</p> <p>16. Manage the Law Library and Subscriptions</p>	<p>What is the deadline in the contract for reporting of the time studies to Social Services/Child support?</p> <p>Justify guardianship hours through payroll reporting and manual tracking by the attorney and staff in Corporation Counsel for guardianship hours worked.</p> <p>What supplies are needed and compare for the most economical cost of those supplies.</p> <p>I need to task who the vendors are? Do the attorneys still want to continue certain subscriptions? When were these subscriptions cancelled or renewed?</p> <p>What is the date these subscriptions are coming due? Are these subscriptions automatic subscriptions? If not an automatic subscription, I track the history of when these renewals are coming</p>	Occasionally	1%



	<p>due. What is this year's/last year's pricing?</p> <p>Are there any new subscriptions the attorneys might be interested in?</p> <p>Where are these books, periodicals, binders, etc., physically placed in the office?</p> <p>Update subscriptions by replacing old pamphlets or pages with new pamphlets or pages.</p> <p>What are the refund policies?</p> <p>Prepare invoices for these subscriptions using Cayenta (the county's financial program).</p> <p>Are there any free subscriptions?</p>		
<p>17. Gathering of confidential information from attorney's notes in Laserfiche or attorney's notes in files and fast-track Chapter 51 (mental commitment) orders for signature and filing.</p>	<p>Dismissals and dispositional orders for commitment and/or orders for medication.</p>	<p>Daily</p>	<p>10%</p>
<p>18. Participates fully in intra-office priority based budgeting discussions and represents the office in peer review process portion of priority based budgeting</p>		<p>Occasionally</p>	<p>1%</p>

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 in government to coordinate general, unique and confidential requests originated by department heads, board supervisors, the Child Support Agency, citizens, etc. Knowledge of court procedures and court rules.
2. Knowledge and advanced skills in Excel used to create and launch a task tracking spreadsheet. Manage, prioritize, identify, analyze, sort and print task tracking data.
3. Establish great communication and represent the department well. Exceed in communication skills with co-workers and subordinates. Convey information and give and receive work direction.
4. Apply skills in alphabetical, alphanumerical and chronological concepts in filing and manage all filing. Apply statutory law and department procedure in the retention and purging of files (i.e., confidential juvenile CHIPS).
5. Utilize skills in Microsoft Office e-mail and calendar and Excel tracking system to develop a "tickler" system and coordinate the vacation/PTO calendar for the entire staff. Take staff meeting notes to transfer information to the PTO/Vacation calendar. Attend demonstrations offered by vendors such as printing services offered by vendors, contract management vendors, etc.
6. Handle the preparation and typing of legal documents relating to the enforcement of zoning citations, garnishments, civil foreclosure cases and preparing legal documents for signature in small claims and other information to meet filing deadlines. Knowledge of legal terms, court procedures and math skills.
7. Knowledge and skill to navigate through internet site in CCAP (court generated information in Wisconsin), and be knowledgeable of daily court dockets and court rotation schedules as it relates to Corporation Counsel.
8. Knowledge and skill utilizing the electronic financial system (Cayenta), to produce financial reports, (i.e, budget, vendor information, and payroll, etc.). Provide employee report forms for attorney signature utilizing Marathon County's policies and procedures manual as a reference to locate codes and deadlines. Assist Corporation Counsel attorney in determining the department's budget requests and knowledge of the budget process.
9. Ability to supervise support staff of varying skill levels, including providing work direction and assignments, and assist in the development of clerical staff skills.
10. Knowledge in navigating and retrieving information and producing documents and drafts in the KIDS System (Wisconsin Child Support System) carrying out job assignments as a back-up to the legal secretary.



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): At least three years of administrative support or legal service experience.

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

Administrative assistant, legal secretary or paralegal degree.

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

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

	Minimum Time Required
Associates Degree and 3 Years Administrative Support or Legal Service Experience	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.

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%
Excel Software	Moderately
Laserfiche Software	Frequently
KIDS/Doc. Gen (State of Wisconsin Child Support System)	Infrequently

Personal Computer, Microsoft Office e-mail applications, calendar applications	Frequently
Fast Scanning/FAX/Copier	Frequently
Microsoft Access	Moderately
Cayenta (County's Financial System)	Frequently
Microsoft OneNote	Frequently
Phone/conference call	Frequently
Calculator	Moderately
Efiling	Frequently

11. DECISION-MAKING & JUDGMENTS.

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

1. Make judgments and decisions by daily managing the task assistance management program to identify tasks/projects in order to prioritize them into three groups: **Top Priority**, high priority, ongoing or low priority, **Not a Priority Issue at This Time**.
2. Make judgments and decisions by taking leadership and responsibility forecasting timelines for some tasks/projects and coordinating information gathering and scheduling of meetings for those tasks. Decide and take the opportunity to analyze the task assistance management program data and confer with the Corporation Counsel attorney. Use this data as a tool to strategize, measure accomplishments and goals of Corporation Counsel, attain the best efficiency in time management and provide a summary memorandum weekly or bi-weekly to the attorney and deputy county administrator. In order to meet some deadlines, independently decide and know who to contact in government and the community as it relates to their functions. The decisions involved include: The requestor, date the request is received, date assigned, follow-up date, last worked date, date completed, type of the request, how request was received, and how responded.
3. **Trusted by attorneys and paralegal to work independently to prepare, through attorney's case notes, Chapter 51 dispositional orders (mental commitment/recommitment orders and dismissals), FAX and distribute confidential orders and confidential doctor reports to only the appropriate parties in these case proceedings.**
4. **Purchase decisions. Trusted to make best use of department resources for routine purchases, including use of department credit card.**

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 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 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.	Never	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.	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.	Infrequently <10%	1--Somewhat 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.	Never	0--Not Important
Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.	Infrequently <10%	0--Not Important
Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position.	Seldom 10% - 25%	0--Not 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.	Infrequently <10%	1--Somewhat Important
Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching the skin, particularly that of fingertips.	Never	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%	3--Extremely Important
Repetitive Motions: Substantial repetitive movements (motions) of the wrists, hands, and/or fingers.	Seldom 10% - 25%	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 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 checked="" type="checkbox"/>	Environmental (disruptive people, imminent danger, threatening environment)	Infrequently <10%

14. ADDITIONAL COMMENTS

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

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: Phyllis G. Simon Date: April 28, 2017

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.

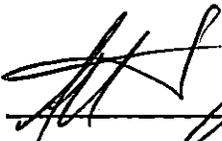
Question No.	Comments

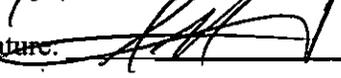
Any supervisory comments must be discussed with the employee.

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: April 28, 2017

Department Head Signature:  Date: 4/28/17

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

Employee Signature: _____ Date: _____

I believe my job duties have further advanced beyond that of an administrative coordinator in the last three years. I have been given the opportunity under the direction of Corporation Counsel and to establish and manage a "Tracking System" to track requested opinions, cases, contracts and projects received in the Corporation Counsel Office that go beyond the regular case load of child support, CHIPS, Chapter 51, guardianship and zoning cases. I serve as a line of communication to the Corporation Counsel attorneys working with county administration, department heads and governmental leaders in scheduling, prioritization, and tracking deadlines to facilitate the completion of task or project requests.

In addition to the Tracking System, I have taken on the role of calendar supervisor for office staff as well as the filing and typing of Appellate Briefs and correspondence.

I agree with Phyllis Simon's request because she has taken on additional duties in the last two years. At the outset of Pay for Performance, Ms. Simon expressed an interest in upgrading her role in the Office of Corporation Counsel to one of "Office Manager." This upgrade has become one of her goals toward employee improvement cited in each of her Performance Reviews.

She has been instrumental in the creation of a "Tracking System." The Tracking System was the suggestion of the Deputy Administrator so that this office can quantify and monitor requested opinions, cases, contracts and projects that have been received by Corporation Counsel that fall outside of its regular case load of child support, CHIPS, Chapter 51, guardianship and zoning cases that are processed on a regular basis. Phyllis was responsible for the creation of the format. Her current role is documenting, prioritizing, communicating, referral and assisting with the completion of each task. Since we started using the system last year, Corporation Counsel has tracked over 200 separate tasks and requests.

Completion of a viable Tracking System has, in turn, been a significant accomplishment for Corporation Counsel in terms of my personal performance goals set by the Deputy Administrator and is an example of system-wide improvement through the performance evaluation process.

As indicated above, communication is an essential part of the tracking system. Phyllis has also taken on the role of communicating on behalf of Corporation Counsel with County Administration and all other department heads and many deputy department heads and many county board members regarding confirmation of receipt, progress on requests and projects assisting with scheduling appointments and setting deadlines. This has improved service on the part of this office.

In addition to the tracking system, the Office of Corporation Counsel has decreased from two full-time legal secretaries and two part-time legal secretaries to one full-time paralegal, one full-time legal secretary (Phyllis) and one part-time legal secretary. Phyllis has assumed the role of calendar supervisor for the entire office. She has also taken on responsibility for typing and filing Appellate Briefs and correspondence.

She has also managed e-filing for all non-child support matters I am responsible for litigating.

Position: Executive Administrative Coordinator

COMMENTS:

The position is currently rated B24.

The Executive Administrative Coordinator manages and coordinates the administrative support services to the Department of Administration. Responsibilities include: drafting and administering the department budget; coordinating projects, events, and meetings; preparing requests for proposals from vendors; maintaining records. The position has increased duties and responsibilities regarding the coordination of assigned programs, events, and activities.

We have examined the essential duties of the position and have classified the position using the Decision Band™ Method (DBM). The job evaluation shows the following:

Highest Banded Task: C4
Number of Highest Banded Tasks: 5/25 responsibility areas
Percent of Time on High Banded Tasks: 10-20%
Degree of Difficulty/Diversity: Low

The position performs tasks that require "processing" decision making. Such duties include: organizing and coordinating assigned programs including logistics, agenda, and contract administration; managing the operations of the Administrative Department including operational and fiscal procedures and functions, work priorities, and projects; communicating with other departments, elected officials, outside agencies, partners, and vendors to identify needs, coordinate services, and improve quality of services. Decisions made at this level are subject to the limits imposed by the available technology and resources and to the constraints set by higher-level management.

The position receives a sub-grade of one (1), because of the low complexity and diversity of C4 tasks in relation to other jobs in the same band. Thus, the correct evaluation of this position is C41.

Position
Department

Executive Administrative Coordinator
County Administration

Reclassification/Pay Grade Adjustment
Effective 01/01/2018

FTE % 100.00%
Annual Hours 2080
Incumbent Mary Palmer
7/31/2017 \$23.86

Current Class, DBM & Hourly Rate: Executive Admin. Coordinator (5025), B24

Item	2018 Proposed Rates	Budget Impact \$23.86	Minimum \$20.61	Mid-Point \$24.22	Maximum \$27.83
DBM B24		\$49,629	\$42,869	\$50,378	\$57,886
FICA Retirement/Medicare Rate	7.65%	\$3,797	\$3,279	\$3,854	\$4,428
Retirement - Employer	6.70%	\$3,325	\$2,872	\$3,375	\$3,878
Worker's Comp - clerical	0.23%	\$114	\$99	\$116	\$133
Unemployment Insurance	0.15%	\$74	\$64	\$76	\$87
Estimated Salary + Benefits (1)		\$56,939	\$49,183	\$57,799	\$66,412

Proposed Class, DBM & Hourly Rate Effective 1-1-2018: Asst. Admin. Manager (5041), C41

Item	2018 Proposed Rates	Budget Impact \$25.15	Minimum \$24.14	Mid-Point \$28.97	Maximum \$33.80
DBM C41		\$52,312	\$50,211	\$60,258	\$70,304
FICA Retirement/Medicare Rate	7.65%	\$4,002	\$3,841	\$4,610	\$5,378
Retirement - Employer	6.70%	\$3,505	\$3,364	\$4,037	\$4,710
Worker's Comp - clerical	0.23%	\$120	\$115	\$139	\$162
Unemployment Insurance	0.15%	\$78	\$75	\$90	\$105
Estimated Salary + Benefits (1)		\$60,017	\$57,606	\$69,134	\$80,659
Estimated Increase		\$3,078	\$8,423	\$11,335	\$14,247

(1) Mandated Fringe Benefits Tied to Salary (FICA, WRS, WC, UE)

Rev. 7/31/2017

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: Mary Palmer

Your Supervisor's Name: Brad Karger

Your Division: _____

Your Department: County Administration

Your Current Classification: Executive Administration Coordinator

- 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: Not sure but would like Assistant Administrative Manager

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:

This position has taken on the Management of the Leadership (and Management) Development Program (Tiers 1 & 2), Brown Bag Lunch Series Program, Management of the Biennial Culture Survey and the Quarterly and Annual Role Models of Our Core Values Program. This position also assists with the development of the Department Heads, Supervisors and Managers Quarterly Retreats, and manages the logistics, and setup for whatever is needed to make the meetings successful. The position is also an integral part of the Department Management Team. This position determines, analyzes and sets most department policies and initiatives and has taken on a managerial role over and above administrative work.

As LDP Manager, this position is responsible for approximately 30 charges in the LDP/LMDP program and enforces policies relating to attendance and all portions of the program. If they are not following the policies of the program, it may lead to leaving the program.

Use additional sheets if necessary

Mary Palmer
Employee Signature / Typed Name

5/3/17
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:

Immediate Supervisor Signature / Typed Name

Date

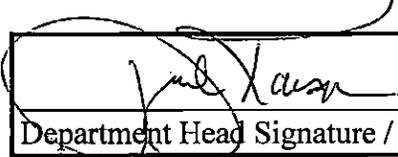
Immediate Supervisor: Complete and forward this form to your Department Head. The Department Head will review this request and make changes as appropriate. Please note that all appeals must be forwarded to the department head no later than **April 30th**.

Department Head or Designee Comments

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

Reason/comment:

The addition of two new committees, Mount View Care Center and Retained County Authority, has ~~also~~ expanded our staff support responsibilities substantially. Asking Mary to take the lead with LMSP is our best strategy for meeting all of our commitments.



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 2017

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: Mary Palmer **Date Form Completed:** 4/28/17
Official Job Title: Executive Administrative Coordinator/Confidential Administrative Specialist **Department:** County Administration
Work Phone: 715-261-1401 **Site:** Courthouse
E-mail: mary.palmer@co.marathon.wi.us **Time in Current Position:** 10 years 1 month
Immediate Supervisor: **Immediate supervisor reports to:**
Name: Brad Karger **Name:** Kurt Gibbs
Title: County Administrator **Title:** County Board Chair
Work Phone: 715-261-1404 **Work Phone:** 715-370-7435
E-mail: brad.karger@co.marathon.wi.us **E-mail:** Kurt.gibbs@co.marathon.wi.us

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



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

In addition to the general duties that are set forth in the second bulleted list below, since the last position classification period, this position has been assigned operational management of the following county programs:

- Marathon County Leadership Development Programs (Tiers 1 and 2)
- Brown Bag Lunch Informational Programs
- Core Value Role Models Recognition Program (Quarterly and Annual)
- Biennial Organizational Culture Survey
- Quarterly Department Head Retreats
- County Administration Department Meetings (scheduling, setting agendas, leading meetings)

This position provides department management and administrative support services to the Department of Administration in the following respects

- Drafting and administering the department budget.
- Managing projects and events
- Organizing records
- Coordinating public and administrative meetings
- Responding to open records requests
- Preparing requests for proposals from vendors
- Managing the technology needs of the department (computer, smart phone, software, etc.)

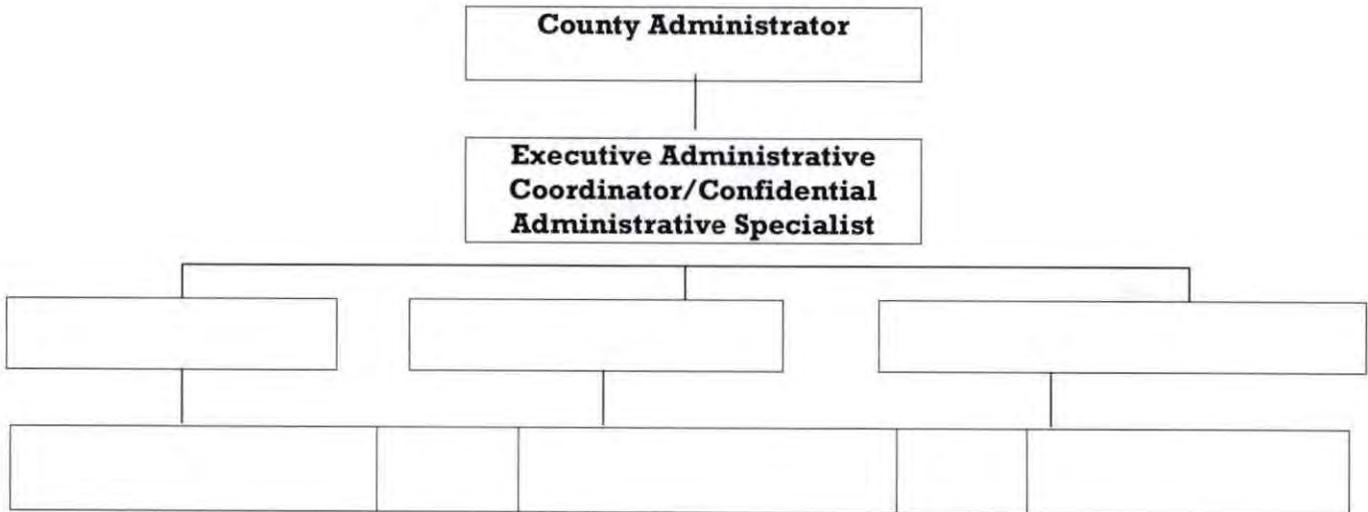
3. SUPERVISORY RESPONSIBILITIES – This is very important.

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.		
X	I provide work direction to and review the work of student workers, temporary and/or contract employees.	.25	1

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

	and coordinate with Employee Resources for the Retirement and Recognition Banquet		
4. Department Management Manage all aspects of the Administration Department, clarify procedures, make decisions on all day-to-day functions of the department.	As Culture Champion: Set department meetings and agendas Lead department meetings Coordinate Rounding for department and department heads Provide Core Value Training Manage recognition program Develop and implement changes for efficiencies.	M	2
5. Manage multiple complex and multifaceted tasks and projects with competing priorities and deadlines and organize and maintain administrative processes.	A. Know what the priorities of the Administrator and Deputy Administrator are including when does their attention need to be redirected and to whom and for what purpose do I make commitments of their time. B. Keep track of the information needs/requests of committees and task forces, ensuring that the information is available as needed.	D	15 12
6. Screen and prioritize communications and opportunities from external and internal sources including public records requests for compliance with State Statutes. Interact with Department Directors, Elected Officials, Employees multiple and varied businesses and outside vendors.	A. Determine and contact the best person/ department/agency to respond to an e-mail or letter sent to the Administrator. B. If a communication is referred out of office for action I follow-up to ensure that the matter was addressed in a timely manner.	D	15-12
7. Responsible for all official records of four standing committees of the County Board of Supervisors, the County Board Rules Review Committee and Joint Legislative Meeting. Prepare in advance agendas, minutes, presentations, and informational packets (attachments) for Standing Committees of the County Board, publicly post and upload to the internet. Assist with and provide	Determine what information should be included in meeting minutes. Determine which committee actions need to be shared with whom and in what time frame i.e. resolutions to go to County Board. Determine agencies, department and municipalities need to be notified on specific	D	20-17

research/background information, content development and creation of presentations and coordinate meetings.	<p>committee action.</p> <p>Answer calls from media about agenda items or action taken by a committee and determine what information is public and what is confidential.</p> <p>Design presentations, forms, handouts; determines who receives materials prior to the meeting. Prepare agendas. Obtain reports and other support documents or prepare them as needed.</p>		
8. Manage the frequently changing schedule/calendar of the County Administrator and Deputy County Administrator.	Know what, who is the priority, determine when it needs to happen and schedule and/or make changes accordingly.	D	10 6
9. Manage projects and events including United Way fundraising events, and other events of this type.	<p>A. What is it we are intending to accomplish at the "big picture" level?</p> <p>B. Determine what resources (time, financial) are allocated to the program/event?</p> <p>C. Establish who needs to be communicated with as part of this project/event and what are the best communication methods?</p> <p>D. Appoint and lead selection committee for awards determination,</p>	M	5 4
6. Troubleshoot technology problems in the department both software and hardware issues. Provide training and recommend upgrade on equipment.	Direct user how to fix problem or perform task or I will fix the problem or will contact the Help Desk or vendor for assistance.	M	2
7. Interact with Department Directors, elected officials, employees, various types of businesses and outside vendors.	<p>A. What information needs/ requests can I respond to independently and what needs to be referred?</p> <p>B. What information can be shared and what information requests should be referred to the administrative chain of command or held as confidential?</p> <p>C. Determine what support the Administrator and Deputy Administrator need to meet due dates and help them assemble data/information they need to prepare reports?</p>	D	10 8

8. Manage all accounting functions of the department including vendor payments, accounts receivable, payroll, state and federal grants and other financial matters. This includes the Justice Coordinator, County Administration and special funds. Provide specialized training and guidance in financial matters.	A. Ensure accounting standards set by the County are followed, purchasing procurements abided by and determine if procedures or processes need to be changed/created to ensure accuracy and accountability.	D	1
9. Calculate, analyze and prepare the annual budget for the department. Identify and prepare any necessary budget adjustment and transfers through the year and at year end to maintain budget accuracy.	Request budget transfers if necessary and where to allocate the budget funds for upcoming projects, materials, wages and equipment in order to maintain the standard level of service.	Q	1
10. Prepare purchase orders, review and approve vendor invoices, payment vouchers, process cash receipts, generate account receivables and general ledger adjustments/corrections.	Ensure costs and projects are charged correctly to projects within budget amounts for invoices, cash receipts and receivables.	W	1
11. Manage the department's financial system in Cayenta for internal accuracy and provide guidance to Justice Programs and Administration on the budget.	It's imperative that the departmental costs are accounted for accurately. I make the decision to conduct accounting transactions to the precise accounts.	W	2-1
12. Develop and implement inventory decisions on departmental needs to maintain accuracy and internal control. Manage, coordinate and conduct inventory of office purchases and promotional materials for the department, justice programs and LEAN processes.	Charge out properly which area or department the materials are needed and handle it effectively and properly.	W	2-1
13. Track and prepare financial information on grant expenditures and reimbursements for reporting to the state and federal government on multiple grants.	Verify the expenditures meet the requirements of the grant for submission.	M	1
14. Develop and implement internal accounting procedures and controls within the department.	Change department processes that affect accounting procedures	Q	1
15. Monitor and approve departmental payroll and submit for processing. Approve time off requests and adjust timesheets as needed through the Intellitime system.	Determine if requests for time off have sufficient time allotted, the timesheets are filled out correctly and submitted in compliance with the payroll department requirements.	W	2

16. Analyze and develop department financial and records procedures to increase efficiency and reduce risk and/or loss.	Determine appropriate classification of expenses and revenues according to general acceptable accounting principles.	W	2-1
18. Internet contact for the Field citizen inquiries on behalf of the County Administrator.	Decide what is the appropriate action to answer the specific questions received.	D	1
19. Manage all OWI Court financials, purchases; graduations; incentives	When a person reaches certain points for follow-through in the OWI program or reaches graduation from the program, I determine where to purchase undesignated incentives for the best value by controlling spending for graduations and incentives.	W	2-1
20. Member of the Department Management Team and Am a member of the Emergency Operations Center Team.	Major decisions are discussed by the department and input is given. When an emergency arises, the team is activated to the EOC to handle the disaster and provide appropriate assistance throughout the county or neighboring counties.	Q	1
21. Determine the County's needs of copy machines and work with the vendor to make sure each department receives the appropriate machine(s)	Decide whether a certain type of copy machine is needed in a particular department i.e. black and white, color, what speed, etc. keeping within the cost and guidelines of the contract.	M	2 1
22. Track and coordinate Request for Proposals. Write and submit for publishing notice to vendors on RFP's.	Establish dates and timelines for RFP's making sure no late proposals are considered. Determine publishing dates for notices.	Q	1
23. Quarterly Management Retreats	Team member to plan retreat; Coordinate logistics, menu, materials, et al for successful outcomes	Q	1
24. Biennial Organizational Culture Survey	Organize rollout sessions Identify participants and prepare e-mails to send to participants Field any questions or problems with the actual electronic survey Distribute and collect paper copies, Mail to vendor. Receive and distribute		5 In even numbered years

	appropriate survey and open ended questions to individual departments		
25. Other duties:			
A. Organize and manage the United Way Basket Raffle	Notify department of timeline for raffle, design and order tickets, handle all paperwork involved in this project		
B. Direct the yearly tornado drill for Administration	Direct employees where to go for the drill, make sure they understand and comply and file related paperwork		
C. Organize and prepare for book fairs	Organize two book fairs each year to raise funds that will go toward United We Can project for the Hunger Coalition of Marathon County.		
Plus many more projects			

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. Handle confidential information in a professional and discreet manner; maintain a high level of professionalism and interpersonal skills, strong attention to detail, organization, written and verbal communication.
2. Extensive knowledge and understand County policies and procedures and organizational structure necessary to ensure appropriate decision-making protocols are followed
3. Anticipate the County Administrator's and Deputy County Administrator's needs and proactively bring together people and resources to support the Administrator in addressing issues
4. Strong computer software programs, functions and operations and internet skills
5. Work across all department to establish and maintain effective working relationships with other employees and the public
6. Knowledge of business math, bookkeeping practices and proper English
7. Exceptional organizational skills.
8. High level of emotional intelligence, strong interpersonal skills, ability to deal with all types of individuals. Strong communicator.
9. Ability to multi-task in a fast-paced environment and decision making abilities
10. Supervisory/Management Skills



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): Combination of an Associate Degree or two year technical certificate in the Administrative Assistant program or equivalent program plus 3-5 years' experience as an Administrative Assistant

What field(s) should training or degree be in?
Administrative Assistant/Secretarial Science or equivalent

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

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

	Minimum Time Required
Senior/ Executive Level Secretary/Admin Administrative Professional	3-5 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 known

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%

Cayenta	Seldom
IMS/PC Inquiry – County Contracts & Finance laser Fische	Infrequently
E.Sponder (Emergency Management)	Infrequently
Smart Board	Infrequently
Adobe Acrobat Writer	Infrequently
Post to Intranet and Internet	Seldom
Land Records	Infrequently
Conference Room Scheduling	Infrequently
Facility Dude	Infrequently
Play Memories (video camera)	Infrequently
Mackie Connect (PA System)	Infrequently
One Solution (SunGard – Tracking system for OWI Court)	Infrequently

11. DECISION-MAKING & JUDGMENTS.

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

1. Review culture survey results, participant feedback for department head input and observation of consultants to determine the Leadership and Management Development Program and Brown Bag Lunch series educational outcomes. The goal is to educate leaders in areas that are most closely related to organizational success. The consultants use this information to determine their educational methods.
2. A County Board member contacts our office while the County Administrator is absent and is furious about an earlier confrontation with a department director. What steps can be taken to de-escalate the conflict? What intermediate actions can be taken or suggested to others to see that concerns are addressed constructively.

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.

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

X **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.	Never	0
Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces.	Never	0
Stooping: Bending body downward and forward by bending spine at the waist.	Infrequent	2
Kneeling: Bending legs at knee to come to a rest on knee or knees.	Infrequent	0

Crouching: Bending the body downward and forward by bending leg and spine.	Infrequent	1
Crawling: Moving about on hands and knees or hands and feet.	Never	0
Reaching: Extending hand(s) and arm(s) in any direction.	Infrequent	1
Standing: Particularly for sustained periods of time.	Infrequent	0
Walking: Moving about on foot to accomplish tasks, particularly for long distances.	Never	0
Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.	Never	0
Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.	Infrequent	0
Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position.	Infrequent	1
Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling.	Frequently	3
Grasping: Applying pressure to an object with the fingers or palm.	Infrequently	0
Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching the skin, particularly that of fingertips.	Infrequently	0
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	2
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	2
Seeing: The ability to perceive the nature of objects by the eye.	Frequently	2
Repetitive Motions: Substantial repetitive movements (motions) of the wrists, hands, and/or fingers.	Frequently	3

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?

This is the highest level, non-routine Confidential Administrative Specialist II position in the County. It is a confidential position with very limited supervision. I receive frequent calls from my current counterparts from various departments for advice and instruction. I work across all County departments providing information and tools needed to create a smooth work flow. My interactions with people internally and externally represent this office – this County – and I do that best by following the County’s Core Values of Service, Integrity, Quality, Diversity, Shared Purpose and Stewardship of Our Resources.

Work performed by the department involves senior administrative leadership and management. The nature of the work involves ~~regular routine~~ interactions with policy makers (38 County Board members) and department directors (13 appointed, 5 elected and 7 reporting to an independent commission). The person in this role must have both excellent social skills, and understanding of the organizational structure and enough sense of the “politics” to understand personal agendas and avoid being drawn into a controversy.

I am responsible for independent discretionary decision making on matters that are political in nature with high impact and high stakes. Communicating with leaders from the Community, County, State and National levels, this position must know what the priorities are, who the players are and the consequences of actions. The impact of error would be a detriment to issues that need to move quickly through the political process. The timing of an issue, public perception and critical relationships all could be impacted if these issues are not handled consistent with the direction of the office and County Board. I have appreciable latitude for determining the appropriate actions, decision or processes to use due to her professional knowledge and experience. All assignments must align with the County’s core values and strategic plan.

I assist the highest level of County management with office management activities, supervises the intern, coordinates daily administration functions including computer support, work procedures and processes, and prepares and maintains official records and reports. I administer and have oversight of county-wide contracts for printing, photocopying, office supplies, cell phones, Sam’s Club memberships and the Marathon County Free Prescription Discount Card program through the National Association of Counties. I lead the annual selection process for recognition of Core Value Role Models and the IDEAS program. I am responsible for maintaining a multi-million dollar budget, accounts payable and payroll. I prepare standing committee (made up of County Board members) materials, packets and agendas for multiple meetings and determine what information goes into the minutes.

See review request.

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: Mary Palmer

Date: 4-28-17

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.

The leadership role that Mary has been asked to play with Leadership and Management Development (LMDP) became necessary when the County Board created two new committees, Retained County Authority and Mont View Care Center, both of these committees have pulled Lance and I away from time we previously would have invested in organizational development.

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: Brad Karger Date: 4-28-17

Department Head Signature: _____ Date: _____

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

Employee Signature: Brad Karger Date: 4-28-17

Position: Administrative Supervisor

COMMENTS:

The position is currently rated B31.

The Administrative Supervisor supervises and coordinates the administrative support activities for the District Attorney's Office, which include the supervision of support staff, budget and fiscal activities, and providing legal assistance to the District Attorney.

We have examined the essential duties of the position and have classified the position using the Decision Band™ Method (DBM). The job evaluation shows the following:

Highest Banded Task: B3
Number of Highest Banded Tasks: 14/20 responsibility areas
Percent of Time on High Banded Tasks: 70-80%
Degree of Difficulty/Diversity: High

The position performs tasks that require "operational" decision making. Such duties include: supervising support staff including prioritizing work, training, and performance evaluation; supervising and coordinating department administrative and fiscal activities such as monitoring budget, running financial statements, ensuring compliance of operations, communication with other departments/agencies to answer questions and solve problems, preparing and maintaining routine legal documents and confidential records. Overall, this position has responsibilities that allow for the incumbent to determine how and when to carry out an operation, but not as to what operations constitute the process.

The position receives a sub-grade of two (2), because of the high complexity and diversity of B3 tasks in relation to other jobs in the same band. Thus, the correct evaluation of this position is B32.

Position
Department

Administrative Supervisor
District Attorney's Office

Reclassification/Pay Grade Adjustment
Effective 01/01/2018

FTE % 100.00%
Annual Hours 2080
Incumbent Nancy Solberg
7/31/2017 \$23.07

Current Class, DBM & Hourly Rate: Administrative Supervisor (5024), B31

Item	2018 Proposed Rates	Budget Impact \$23.07	Minimum \$20.61	Mid-Point \$24.22	Maximum \$27.83
DBM B31		\$47,986	\$42,869	\$50,378	\$57,886
FICA Retirement/Medicare Rate	7.65%	\$3,671	\$3,279	\$3,854	\$4,428
Retirement - Employer	6.70%	\$3,215	\$2,872	\$3,375	\$3,878
Worker's Comp - clerical	0.23%	\$110	\$99	\$116	\$133
Unemployment Insurance	0.15%	\$72	\$64	\$76	\$87
Estimated Salary + Benefits (1)		\$55,054	\$49,183	\$57,799	\$66,412

Proposed Class, DBM & Hourly Rate Effective 1-1-2018: Admin. Supervisor-DA, B32

Item	2018 Proposed Rates	Budget Impact \$24.22	Minimum \$22.82	Mid-Point \$26.81	Maximum \$30.80
DBM B32		\$50,378	\$47,466	\$55,765	\$64,064
FICA Retirement/Medicare Rate	7.65%	\$3,854	\$3,631	\$4,266	\$4,901
Retirement - Employer	6.70%	\$3,375	\$3,180	\$3,736	\$4,292
Worker's Comp - clerical	0.23%	\$116	\$109	\$128	\$147
Unemployment Insurance	0.15%	\$76	\$71	\$84	\$96
Estimated Salary + Benefits (1)		\$57,799	\$54,457	\$63,979	\$73,500
Estimated Increase		\$2,745	\$5,274	\$6,180	\$7,088

(1) Mandated Fringe Benefits Tied to Salary (FICA, WRS, WC, UE)

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: Nancy Solberg

Your Supervisor's Name: Theresa Wetzsteon

Your Division: _____

Your Department: District Attorney

Your Current Classification: Administrative Supervisor

- 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: Assistant Administrative Manager

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 supervise 7 support staff. This includes assigning work, making sure they have sufficient training, conducting performance evaluations, making sure staff follows policies, procedures and core values, and making recommendations to the District Attorney regarding hiring, discipline and termination. I handle the District Attorney's Office financial records, which includes accounts payable, accounts receivable, and budget preparation. I also order supplies based upon my determination of what is needed.

I assist with the implementation of internal operations for the District Attorney's Office. This includes coordinating and administering programs, processes, procedures, and systems, such as e-Filing, Laserfiche, Bates numbering for discovery, Evidence.com for body cams, Omnicast, etc. I work with other departments to identify and solve issues in procedures that affect both departments. I attend a number of meetings at which I contribute ideas as well as take minutes. I maintain confidential personnel records. I have access to the District Attorney's Outlook, Protect and paper calendar to which I can add or remove meetings or events. I am responsible for finding special prosecutors for cases that our office has a conflict with and then keeping track of these files until they are completed.

Use additional sheets if necessary

Nancy Solberg
Employee Signature / Typed Name

04/25/2017
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:

Theresa Wetzsteon
Immediate Supervisor Signature / Typed Name

5/1/17
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:

Theresa Wetzsteon
Department Head Signature / Typed Name

5/1/17
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

DUE: April 30 to ER

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: Nancy Solberg Date Form Completed: 04/25/2017

Official Job Title: Administrative Supervisor Department: District Attorney

Work Phone: 715-261-1112 Site: Courthouse

E-mail: Nancy.Solberg@da.wi.gov Time in Current Position: 1 year 6 months

Immediate Supervisor: Theresa Wetzsteon **Immediate supervisor reports to:** _____

Name: Theresa Wetzsteon Name: _____

Title: District Attorney Title: _____

Work Phone: 715-261-1111 Work Phone: _____

E-mail: Theresa.Wetzsteon@da.wi.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.

I manage the internal and fiscal operations of the Marathon County District Attorney's Office, including the supervision of 7 full-time support staff, which includes conducting performance evaluations, maintaining confidential personnel files, creating and monitoring budgets, financial forecasting, accounts payable, accounts receivable, and purchasing. I also provide legal assistant support to the District Attorney, which includes preparing routine legal documents, organizing reports and documents in preparation for trial, and communicating with defense attorneys, law enforcement, and other departments regarding case files. I work with other departments to identify and solve issues in procedures and I am responsible for finding special prosecutors from other District Attorneys' offices within the State of Wisconsin for files that our office has a conflict with.



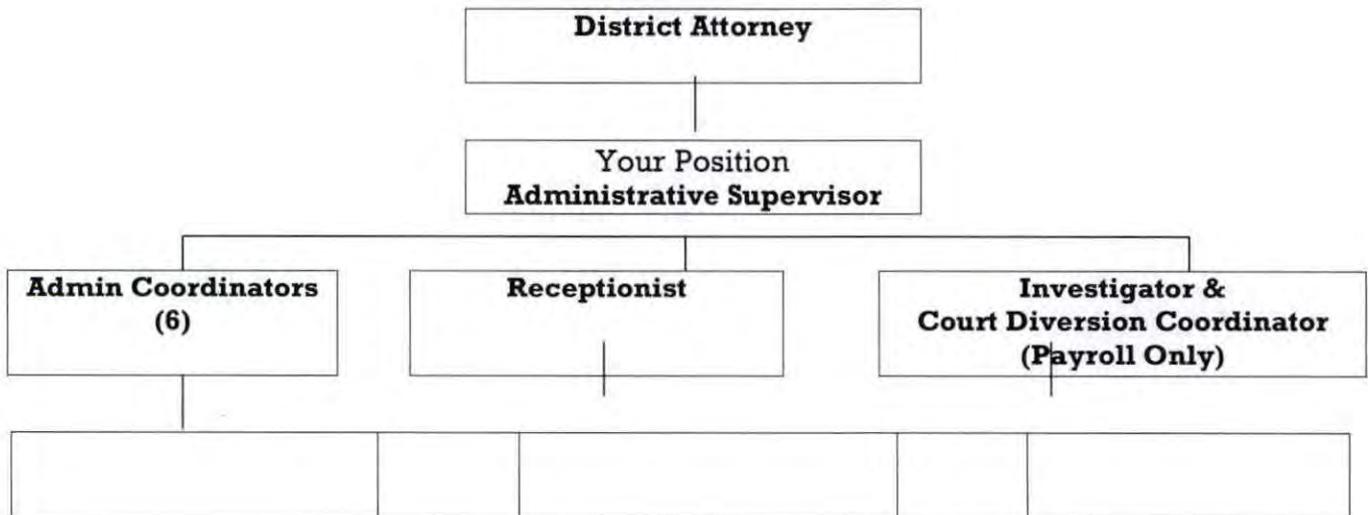
3. SUPERVISORY RESPONSIBILITIES – This is very important.

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.	7	
<input checked="" type="checkbox"/>	I provide work direction to and review the work of student workers, temporary and/or contract employees. (Scanner and Summer Intern)		2

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>Monthly</i>	<i>25%</i>
<i>Performs inventory spot checks and monthly counts of supplies in warehouse.</i>	<i>When to check supplies</i>	<i>Monthly</i>	<i>10%</i>
1. Supervises 7 full-time support staff. This includes approving their leave requests and timecards on Intellitime, training them, noticing problems with work performance and then meeting with them to correct these problems. I act as a liaison between the people I supervise and other County departments to get answers to their questions or help solve problems they are having.	Determine if office will have sufficient coverage when PTO requested; Recognizing when there is a problem with work performance and determining the solution.	Daily	20% This is an ongoing duty that may interrupt my other work when necessary
2. Does the necessary entries into financial software and document preparation to have the DA's	Are the invoices correct? What account does each invoice get posted to?	Bi-Weekly	5%

Office's invoices paid out of the correct line item of the DA's budget.			
3. Prepares accounts receivable invoices on the financial software. This includes reviewing entries in Excel for errors.	Are the attorneys current with their accounts? If not, what is next step?	Monthly	5%
4. Prepare, analyze and reconcile financial documents by preparing annual departmental budget, running financial statements, determining errors or inconsistencies, preparing adjusting entries.	Where and why there are inconsistencies? How to reconcile inconsistencies?	Quarterly	5%
5. Prepares discovery to be sent to defense, including: drafting letters, demands, & fee collection summaries; copying documents & reports; locating and burning electronic media onto CD/DVD's such as squad videos, digital photos, Omnicast interviews; copying CD/DVD's	Order of reports, if electronic media exists, how to retrieve electronic media	Daily	2%
6. Prepares routine documents such as dismissals; requests for adjournment, civil judgments for restitution, subpoenas/notices, writs, etc.		Daily	2%
7. As financial officer for the grants that help fund positions in the office, I run reports from our financial system to help with the preparation of grant documents.	Identify and correct any errors in data entries.	Monthly	2%
8. Purchases supplies for the office.	Which supplies are needed? how much to order?	Weekly	5%
9. TAC Coordinator for the DA's Office. This includes making sure we comply with the TIME System and completing a biennial audit from CIB.	How is the office not in compliance? How to make the office compliant? Does anyone need to update their credentials?	Occasionally	2%
10. Communicate with other departments, attorney offices, and law enforcement agencies regarding individual cases or overall procedures to answer questions, solve problems, determine better ways to achieve goals.	What kind of information can I share; what is causing problems; what are solutions to these problems	Daily	5%
11. Drafts and distributes the		Bi-Weekly	5%

agenda for the attorney and support staff meetings; Prepares the minutes for both the support staff and attorney meetings.			
12. Maintain confidential personnel records.		Ongoing	5%
13. Maintain special prosecutor files, which includes emailing DA's from other counties to locate one who can take the case, preparing the appropriate forms to appoint them as special prosecutor, sending the file contents to the special prosecutor, and keeping track of the case until it is completed.		Ongoing	3%
14. I assist the District Attorney in handling confidential matters.	A variety of decisions need to be made depending on the situation.	Ongoing	5%
15. Help maintain the DA's calendar in Protect, Outlook and in her paper book.	Does the DA have a conflict?	Ongoing	5%
16. Check E-Filing queue not only for mail belonging to the DA, but mail that is regarding cases assigned to former prosecutors or not yet assigned.	Who should the case be assigned to?	Ongoing	5%
17. Check e-Filing queue for events that have errors and correct those errors.	What is the cause of the error? Who needs to make the correction, COC or DA Office?	Ongoing	5%
18. Prepares the Reception Desk Schedule that assigns who will cover for the receptionist during breaks or time off.		Bi-Weekly	5%
19. Covers for receptionist according to phone schedule.		Weekly	2%
20. Covers for other support staff, especially for the person who handles all the reports being referred by law enforcement agencies.		Occasionally	2%
13. Other duties as assigned		Daily	5%

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 the court system & procedures
2. Ability to determine work priorities
3. Work independently and take initiative
4. Ability to communicate with others
5. Ability to type with reasonable speed and accuracy
6. Knowledge of computer software programs
7. Legal experience
8. Management Skills
9. Basic Accounting Skills
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 (I have an associate degree in paralegal technology from Harper College in Palatine, IL. I had majored in accounting for 2 years prior to deciding to change my major to the legal field.)
- Bachelor's degree in _____
- Master's degree in _____
- Other (explain): _____

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

Legal Secretarial Science / Paralegal



8. EXPERIENCE - *This is very important.*

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

	Minimum Time Required	
Post-high school education & legal experience	8	Years
_____		years
_____		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%
PROTECT (Prosecutors Technology for Case Tracking)	Frequently > 50%
CCAP (Consolidated Court Automation Programs)	Frequently > 50%
Arbitrator 360 Back-End Client (newer squad videos program)	Frequently >50%
Omnicast (program used for audio/visual documentation of interviews used by law enforcement)	Frequently > 50%
Laserfiche (program used for viewing and exporting files associated with law enforcement case numbers and reports)	Frequently > 50%
Cayenta Financials Software	Frequently > 50%
Intellitime (supervisor)	Frequently > 50%
Microsoft Outlook (emails, appointment calendar, task lists)	Frequently > 50%
Microsoft Word	Frequently > 50%
Copier; Fax	Frequently > 50%
Miscellaneous internet cites to locate defendants/witnesses	Moderately 25% - 50%
E-Filing (CCAP/Protect Interface System)	Frequently >50%
Evidence.com (Body Cam storage website)	Moderately 25-50%
Laserfiche Client (advanced version of Laserfiche which allows the users to make redactions to documents and to page number documents)	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. **Assessing the needs of my staff and providing appropriate information and training to address their concerns and give them the skills they require to be successful.**
2. **Answering questions and solving issues raised within the office and by other departments regarding procedures and policies.**

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.	Select	Select
Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces.	Select	Select
Stooping: Bending body downward and forward by bending spine at the waist.	Frequently > 50%	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.	Moderately 25% - 50%	2--Very Important
Crawling: Moving about on hands and knees or hands and feet.	Select	Select
Reaching: Extending hand(s) and arm(s) in any direction.	Moderately 25% - 50%	2--Very Important
Standing: Particularly for sustained periods of time.	Select	Select
Walking: Moving about on foot to accomplish tasks, particularly for long distances.	Moderately 25% - 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%	Select
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.	Frequently > 50%	2--Very Important
Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching the skin, particularly that of fingertips.	Select	Select
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.	Moderately 25% - 50%	3--Extremely Important
Hearing: Ability to receive detailed information through oral communication, and to make fine	Frequently > 50%	3--Extremely Important

discriminations in sound, such as when making fine adjustments on machined parts.		
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 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?

The work volume is high and demanding, which causes the need to be able to prioritize and manage time wisely. I have to be willing and able to change and develop strategies at any given moment when addressing situations that need immediate attention.

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: Nancy Solberg Date: 04/25/2017

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 – DA Theresa Wetzsteon

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: Theresa Wetzsteon Date: 5/1/17

Department Head Signature: Theresa Wetzsteon Date: 5/1/17

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

Employee Signature: Nancy Solberg Date: 05/01/2017

Position: Accounting Professional

COMMENTS:

The position is currently rated C43.

The Accounting Professional has responsibilities in both County Finance Department's System and financial reporting, which include troubleshooting and resolving software application issues, testing software upgrades, updating database and security settings, and training end users.

We have examined the essential duties of the position and have classified the position using the Decision Band™ Method (DBM). The job evaluation shows the following:

Highest Banded Task: C4

Number of Highest Banded Tasks: 6/8 responsibility areas

Percent of Time on High Banded Tasks: 80-90%

Degree of Difficulty/Diversity: High

The position performs tasks that require "processing" decision making. Such duties include: comprehensive maintenance of County's financial system including system security, upgrades, database maintenance; providing system training and guidance to employees and supervisors; updating and maintaining training materials; troubleshooting system issues; reconciling and auditing accounts; and preparing financial reports. Decisions made at this level are subject to the limits imposed by the available technology and resources and to the constraints set by higher-level management.

The position receives a sub-grade of four (4), because of the low complexity and diversity of C4 tasks in relation to other jobs in the same band. Thus, the correct evaluation of this position is C44.

Position
Department

Accounting Professional
Finance Department

Reclassification/Pay Grade Adjustment
Effective 01/01/2018

FTE % 100.00%
Annual Hours 2080
Incumbent Christopher Buskirk
7/31/2017 \$31.31

Current Class, DBM & Hourly Rate: Accounting Professional (5003), C43

Item	2018 Proposed Rates	Budget Impact \$31.31	Minimum \$27.01	Mid-Point \$32.42	Maximum \$37.82
DBM C43		\$65,125	\$56,181	\$67,434	\$78,666
FICA Retirement/Medicare Rate	7.65%	\$4,982	\$4,298	\$5,159	\$6,018
Retirement - Employer	6.70%	\$4,363	\$3,764	\$4,518	\$5,271
Worker's Comp - clerical	0.23%	\$150	\$129	\$155	\$181
Unemployment Insurance	0.15%	\$98	\$84	\$101	\$118
Estimated Salary + Benefits (1)		\$74,718	\$64,456	\$77,367	\$90,254

Proposed Class, DBM & Hourly Rate Effective 1-1-2018: Sr. Accting. Professional (5004), C44

Item	2018 Proposed Rates	Budget Impact \$31.69	Minimum \$28.81	Mid-Point \$34.57	Maximum \$40.34
DBM C44		\$65,915	\$59,925	\$71,906	\$83,907
FICA Retirement/Medicare Rate	7.65%	\$5,043	\$4,584	\$5,501	\$6,419
Retirement - Employer	6.70%	\$4,416	\$4,015	\$4,818	\$5,622
Worker's Comp - clerical	0.23%	\$152	\$138	\$165	\$193
Unemployment Insurance	0.15%	\$99	\$90	\$108	\$126
Estimated Salary + Benefits (1)		\$75,625	\$68,752	\$82,498	\$96,267
Estimated Increase		\$907	\$4,296	\$5,131	\$6,014

(1) Mandated Fringe Benefits Tied to Salary (FICA, WRS, WC, UE)

Rev. 7/31/2017

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: Christopher Buskirk

Your Supervisor's Name: Kristi Kordus

Your Division: _____

Your Department: Finance Department

Your Current Classification: Accounting Professional

- 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: Senior Accounting Professional

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 have been designated as the County Finance Department's System Specialist and Accounting Professional. The system specialist work involves working on troubleshooting and resolving software application issues, testing accounting software upgrades, updating database and security settings for application software users and providing training for our Cayenta Financial Software, IntelliTime Time and Attendance System, and various Marathon County financial applications. There are approximately 125 County users on Cayenta and 470 users on IntelliTime.

I have security access to add, delete and modify the Finance Department website content. I upload updated information to the web for internal and external users. I answer accounting questions from fiscal managers and employees in the County departments. I research and develop accounting procedures for various accounting cycles. My duties also include reconciling our BMO Harris bank account and special deposit accounts on a monthly basis.

As for the Accounting Professional duties, I create financial reports and develop project specific reporting capabilities for Marathon County financial and accounting systems. I review, process, and verify financial transactions related to our financial system (payables, receivables, general ledger entries, payment processing, time entry, etc.). I work on the County's budget updating the annual information for the payroll and operations side of the budget. I am able to use scripting to upload department data into budget software. For reporting capabilities, I am able to take data and convert it into a usable format for uploading into software applications and reports. I have created customizable spreadsheets to be used by departments for Pay-for-Performance decision making analysis. I develop work papers and reports that are used by the County's independent auditors for incorporation into the County's Comprehensive Annual Financial Report.

I am a key contributor in providing training and guidance to the new employees in the Finance Department. Although I am in the same position as an Accounting Professional as when I started in the department, I have taken on a completely new role filling part of the void left behind from our previous senior accounting professional and accounting professional. I am also overseeing processes and providing instructions to my replacement, the other accounting professional that was hired in the Finance Department, on all of my prior duties that are not listed on this form.

Failure to complete the duties associated with this position in a timely or accurate fashion could result in negative audit findings, fines, and/or other potential penalties. I backup a majority of the processes of the other Finance Department staff. If the senior accounting professionals, accounting professional, or accounting specialist is out of the office for an extended period of time, a number of their duties have been completed by my position in the past.

Use additional sheets if necessary

Christopher Buskirk	5/4/17
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:

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:

Kristi Kordus

5/5/17

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: Christopher Buskirk Date Form Completed: 4/24/2017
Official Job Title: Accounting Professional Department: Finance
Work Phone: 715-261-1174 Site: Courthouse
E-mail: christopher.buskirk@co.marathon.wi.us Time in Current Position: 3 years 3 months

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

Name: Kristi Kordus Name: Lance Leonhard
Title: Finance Director Title: Deputy County Administrator
Work Phone: 715-261-1172 Work Phone: 715-261-1402
E-mail: Kristi.Kordus@co.marathon.wi.us E-mail: Lance.Leonhard@co.marathon.wi.us



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 have been designated as the County Finance Department's System Specialist and Accounting Professional. The system specialist work involves working on troubleshooting and resolving software application issues, testing accounting software upgrades, updating database and security settings for application software users and providing training for our Cayenta Financial Software, IntelliTime Time and Attendance System, and various Marathon County financial applications. There are approximately 125 County users on Cayenta and 470 users on IntelliTime.

As for the Accounting Professional duties, I create financial reports and develop project specific reporting capabilities for Marathon County financial and accounting systems. I review, process, and verify financial transactions related to our financial system (payables, receivables, general ledger entries, payment processing, time entry, etc.). I work on the County's budget updating the annual

information for the payroll and operations side of the budget. I am able to use scripting to upload department data into budget software. For reporting capabilities, I am able to take data and convert it into a usable format for uploading into software applications and reports. I have created customizable spreadsheets to be used by departments for Pay-for-Performance decision making analysis. I develop workpapers and reports that are used by the County's independent auditors for incorporation into the County's Comprehensive Annual Financial Report.

I have security access to add, delete and modify the Finance Department website content. I upload updated information to the web for internal and external users.

I work as a team member answering accounting questions from fiscal managers and employees in the County departments. I research and develop accounting procedures for various accounting cycles. My duties also include reconciling our BMO Harris bank account and special deposit accounts on a monthly basis.



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.		2

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. Comprehensive maintenance of Marathon County's financial system. This includes: Reviewing entries and maintaining periodic and annual data tables, testing software upgrades, updating database tables, monitoring system security, and providing software application access to new users. I offer the first level of support to user with system issues, questions, and requests.	Troubleshoot and determine when an application problem needs to be escalated to the software vendor and what direction should be followed to resolve the software problem. Instruct software users on what procedures should be used, modified or eliminated in respect to the financial software. Determine which reports and applications should be used to monitor problems and locate inaccurate	Daily	25%

	<p>entries in the system. Choose when to update database background tables due to issues and what should be tested. Decide what type of access and departmental security should be given to new County financial users. Create reports or spreadsheets that provide a department with the data requested. Customize spreadsheets and develop custom queries to meet the needs of the financial customers and fiscal managers of the County.</p>		
<p>2. Rollout and implement our IntelliTime Time & Attendance System to new departments. This is the County's "electronic" time keeping and scheduling system. Coordinate meetings, prepare material, and train all employees and supervisors on how to navigate, approve documents, and use our time entry software. Test system upgrades and provide training and materials to departments regarding system changes. Upload training materials and procedure manuals to the Finance Department websites (internet and intranet).</p>	<p>Facilitate meetings with administrative staff in other departments to discuss time entry processes and assess software needs. Assemble and analyze the information gathered to determine documents, pay codes, background settings, and calculation rules to develop for each unique department. Determine which projects will need assistance from IT and IntelliTime support staff. Choose materials to prepare for training and related guides.</p>	<p>Quarterly</p>	<p>10%</p>
<p>3. Provide support to employees and supervisors using our time & attendance system. Troubleshoot issues and</p>	<p>Evaluate solutions to system issues and answers to user questions. Determine system logic for the purpose of sequencing</p>	<p>Weekly</p>	<p>15%</p>

answer questions. Setup database background tables, documents, pay codes, schedules, user records, and calculation rules for each department. Review bi-weekly timecards for all employees. Upload time entry data into our financial software to process Payroll.	application fixes and how software setting should be applied in the system. Determine which errors or inconsistencies to verify on timecards and when entries should be processed.		
4. Document and maintain financial system and time and attendance system user manuals. Upload and maintain documents and forms to the Finance Department website and intranet site. Create documents and scripting spreadsheets to assist departments in completing financial system entries more accurately and efficiently.	Select which procedures/guides take priority for documenting a process. Determine when a procedure or form is outdated and needs to be revised. Offer financial processing solutions and documents to other departments that struggle to meet processing deadlines.	Annually	5%
5. Compile reports and information for the County's annual financial audit and Comprehensive Annual Financial Report. Prepare audit work papers for payables, receivables, fixed assets, and general ledger entries.	Determine reports and information to prepare to meet audit requests. Choose information to request from other departments, forms to complete, and general ledger entries needed to comply with financial reporting requirements.	Annually	10%
6. Reconcile BMO Harris Bank Account and special deposit accounts. Audit deposits, withdrawals, and financial system transactions completed by departments and the County Treasurer's Office. Assist the County Treasurer and Deputy County Treasurer in resolving payment processing problems and	Determine reports to generate to verify transactions for audit compliance. Identify and correct transactions that have not cleared properly. Determine if problems noted during reconciliations indicate a one-time error or indicate potential fraud, misconduct, or other questionable activity. Decide if adjustments	Monthly	10%



incorrect financial system entries.	are needed to procedures to prevent future inaccuracies.		
7. Prepare, verify, and process accounts payable payment invoices, weekly accounts receivable billings, monthly receivable statements, and journal entries for Marathon County departments. Setup new vendor records, customer records, and general ledger codes when necessary.	Audit and review transactions completed by other financial system users that may have been processed inaccurately. Determine whether charges received from vendors are valid, that receivables billed are for the correct periods and amounts, and verify that the correct general ledger codes are used for given transactions.	Weekly	10%
8. Develop and maintain documents used by department heads and administrative staff for pay-for-performance employee evaluations. Process annual employee bonuses and raises received following evaluations. Update and verify data provided by departments for the annual budget process for payroll employee information and general ledger accounts. Currently in the process of implementing our IBM Cognos TM1 Budget Software.	Determine employee information and projections needed by department heads and administrative staff for annual reviews, merit increases, and budget considerations. Identify budget information that will need to be reviewed and updated for each employee and related general ledger accounts.	Annually	5%
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. Ability to perform mid-level data analysis, including the ability to audit, assess, conclude, evaluate, and develop alternative solutions. Requires discretion in determining information which should not be released due to legal or privacy issues.
2. Ability to utilize a variety of descriptive and advisory information and references. This includes accounting reports, financial statements, computer system reports, contracts, user manuals, federal guidelines and state statutes, technical guides, procedural manuals, and non-routine correspondence.
3. Ability to provide guidance, assistance and/or interpretation to others--such as co-workers, supervisors, department heads, and the general public--on how to apply policies, procedures, and standards for specific situations.
4. Ability to communicate orally and in writing with a variety of internal departments, governmental entities, outside businesses and the general public.
5. Ability to perform addition, subtraction, multiplication and division with attention to detail; calculates percentages and decimals; utilize fractions and basic algebra; calculate amortizations, interest accruals, gains, losses, and internal rates of return.
6. Ability to design and understand complex electronic spreadsheets, which may be used for reports or to give outside presentations.
7. Ability to perform formal instruction in a classroom or other structural setting as well as one-on-one; ability to assess a student's needs and their capacity to learn.
8. Ability to establish workplans so that projects with long lead-times (several months or more) can be completed by the required deadline.
9. Knowledge of double-entry accounting principles/procedures and how those principles operate in a multi-fund governmental environment; knowledge of Generally Accepted Accounting Principles (GAAP) and Generally Accepted Auditing Standards (GAAS).
10. Knowledge of the organization's work and the functions of Federal, State and Local government--with particular knowledge of grant-supported programs. Additionally requires a knowledge of how the County's internal website (intranet) is used and updated, so the information provided and maintained by the Finance Department is both relevant and current.



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 **Business Administration; Accounting**
- Master's degree in _____
- Other (explain): 3 years of government accounting experience

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

Degree in Accounting. Additional training in government accounting, database and software applications management, and business administration would be helpful.

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

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

	Minimum Time Required
Managing and maintaining a financial system or related software.	2 years
Reviewing and auditing transactions to identify areas where potential fraud could occur.	2 years
Government program reporting and auditing.	2 years

9. SPECIAL REQUIREMENTS:

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

Do not use acronyms.
No special requirements.

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%
Cayenta Financial Software	Frequently > 50%
IntelliTime Time & Attendance System	Moderately 25% - 50%
Crystal Report Writer Software	Seldom 10% - 25%
Laserfiche Software	Infrequently <10%
PayBud Budgeting Software (Soon to be IBM Cognos TM1)	Infrequently <10%
Sage Fixed Assets Premier Depreciation & Adobe Acrobat Pro	Infrequently <10%

11. DECISION-MAKING & JUDGMENTS.

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

1. Review and assess all transactions impacting the County's general ledger, and potentially monthly bank reconciliations, to determine if activity was performed correctly by financial institution or financial system user. Requires a full understanding of:
 - *How transaction types (accounts payable, receivables, payroll, cash receipts, and wires/transfers/ACHs) are processed on the County's books and how those transactions impact the County's bank accounts;
 - *Which transactions will generate timing issues, how to fund those transactions in the County's ledger, and how those items must be adjusted.
 - *How to identify transaction which have not been processed properly, then assess whether the problems need to be corrected by the County or the financial institution; and
 - *Which transactions and amounts are recurring in nature, which transactions are non-recurring (but valid) in nature, and which transactions are suspicious or potentially fraudulent-requiring additional follow-up.

2. Design, implement, update, and present training for IntelliTime Time & Attendance Software and Cayenta Financial Software. This includes determining which procedures will be highlighted/emphasized, how the material will be presented, which training data examples/samples will demonstrate an idea or concept best, what type of data the students will have access to, and whether students should be trained in a group atmosphere or in a one-on-one setting.

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 checked="" 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.	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%	1--Somewhat 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.	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.	Seldom 10% - 25%	1--Somewhat 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.	Infrequently <10%	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.	Infrequently <10%	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.	Frequently > 50%	3--Extremely Important
Grasping: Applying pressure to an object with the fingers or palm.	Seldom 10% - 25%	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%	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 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 am a key contributor in providing training and guidance to the new employees in the Finance Department. Although I am in the same position as an Accounting Professional as when I started in the department, I have taken on a completely new role filling part of the void left behind from our previous senior accounting professional and accounting professional. I am also overseeing processes and providing instructions to my replacement, the other accounting professional that was hired in the Finance Department, on all of my prior duties that are not listed on this form.

Failure to complete the duties associated with this position in a timely or accurate fashion could result in negative audit findings, fines, and/or other potential penalties. I backup a majority of the processes of the other Finance Department staff. If the senior accounting professionals, accounting professional, or accounting specialist is out of the office for an extended period of time, a number of their duties have been completed by my position in the past.

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: Christopher Buskirk Date: April 24, 2017

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: Kristi Kordus _____ Date: 4/26/17 _____

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

Employee Signature: Chris Buskirk _____ Date: _____
4/26/17 _____

Position: Solid Waste Manager

COMMENTS:

The position is currently rated C42.

The Solid Waste Manager oversees the daily operations of the solid waste facilities and programs, which include developing community waste reduction programs, advising on recycling methods, coordinating large scale environmental cleanups and demolition projects and ensuring compliance with Federal and State solid waste regulations.

We have examined the essential duties of the position and have classified the position using the Decision Band™ Method (DBM). The job evaluation shows the following:

Highest Banded Task: C5
Number of Highest Banded Tasks: 3/10 responsibility areas
Percent of Time on High Banded Tasks: 30-40%
Degree of Difficulty/Diversity: Low

The position performs tasks that require "processing" decision making. Such duties include: supervising staff and daily operations of the solid waste facilities; ensuring compliance with site's plan, and State/Federal regulations; providing recommendations for site improvement including infrastructure upgrading, expansion, and new operation process and procedures. Decisions made at this level are subject to the limits imposed by the available technology and resources and to the constraints set by higher-level management.

The position receives a sub-grade of one (1), because of the low complexity and diversity of C5 tasks in relation to other jobs in the same band. Thus, the correct evaluation of this position is C51.

Position SOLID WASTE MANAGER
Department SOLID WASTE

Reclassification/Pay Grade Adjustment
Effective 01/01/2018

FTE % 100.00%
Annual Hours 2080
Incumbent DAVID HAGENBUCHER
7/31/2017 \$27.94

Current Class, DBM & Hourly Rate: Solid Waste Manager (5343), C42

Item	2018 Proposed Rates	Budget Impact \$27.94	Minimum \$25.58	Mid-Point \$30.69	Maximum \$35.81
DBM C42		\$58,115	\$53,206	\$63,835	\$74,485
FICA Retirement/Medicare Rate	7.65%	\$4,446	\$4,070	\$4,883	\$5,698
Retirement - Employer	6.70%	\$3,894	\$3,565	\$4,277	\$4,990
Worker's Comp - Municipal	4.20%	\$2,441	\$2,235	\$2,681	\$3,128
Unemployment Insurance	0.15%	\$87	\$80	\$96	\$112
Estimated Salary + Benefits (1)		\$68,983	\$63,156	\$75,772	\$88,413

Proposed Class, DBM & Hourly Rate Effective 1-1-2018: Solid Waste Manager (5343), C51

Item	2018 Proposed Rates	Budget Impact \$30.00	Minimum \$28.81	Mid-Point \$34.57	Maximum \$40.34
DBM C51		\$62,400	\$59,925	\$71,906	\$83,907
FICA Retirement/Medicare Rate	7.65%	\$4,774	\$4,584	\$5,501	\$6,419
Retirement - Employer	6.70%	\$4,181	\$4,015	\$4,818	\$5,622
Worker's Comp - Municipal	4.20%	\$2,621	\$2,517	\$3,020	\$3,524
Unemployment Insurance	0.15%	\$94	\$90	\$108	\$126
Estimated Salary + Benefits (1)		\$74,070	\$71,131	\$85,353	\$99,598
Estimated Increase		\$5,087	\$7,974	\$9,580	\$11,185

(1) Mandated Fringe Benefits Tied to Salary (FICA, WRS, WC, UE)

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: <u>David Hagenbucher</u>	RECEIVED APR 28 2017 MARATHON COUNTY EMPLOYEE RESOURCES DEPT.
Your Supervisor's Name: <u>Meleesa Johnson</u>	
Your Division: <u>Management</u>	
Your Department: <u>Solid Waste</u>	
Your Current Classification: <u>C42</u>	

- 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: C52

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 Solid Waste Manager is responsible for overseeing the daily operations of the solid waste facilities and programs that serve customers and communities throughout Central and North-Central Wisconsin. The Manager position has taken on the responsibilities of site supervisor, operations manager, project manager, equipment manager, environmental compliance manager, and assistant business administrator. In addition, managing, directing, and evaluating the performance of 6 full time employees and 4 part time is now a requirement. This has increased from the current classification which only required 2 employees.

The Solid Waste Manager now works directly with more than 30 programs that provide the community with economic vitality, workforce development, education, health and well-being, safety, and recreational opportunities. Work involves developing community waste reduction programs, advising businesses on recycling methods, as well as working with environmental consultants and the State of Wisconsin on large scale environmental cleanups and demolition projects. Continuous effort goes into management and compliance of mandatory Wisconsin DNR permits; air management, hazardous waste, and solid waste. State and federal waste regulations must be followed to ensure that routine site inspections do not result in violations. Managing approximately 250,000 tons of materials per year means that site safety and customer service are both highly demanding and require ongoing supervision of both customers and staff. Small landfills across the state are closing, and larger regional landfills are growing and are becoming the new standard across the industry. The department now accepts material from as many as 16 counties, and has become a regional resource for professional, cost effective, and efficient solid waste management.

Daily supervision of 6 full time employees involves building a full team mentality, scheduling workloads, and setting goals that are in the best interest for the department. Regular meetings,

one on one discussion, and rounding are all essential to helping employees function at their highest level, and thus helping the department meet the goals of its strategic plan. Positive feedback and constructive criticism are necessary, and promotion of professional development is a dominant standard. Helping employees learn and grow in their positions aids in the development of the department overall. During summer hours, supervisory responsibilities increase with the addition of 1 LTE, and 3 student interns, requiring the manager to provide direction to 10 employees. In addition, good leadership must be implemented with all related work and must meet the standards set by the leadership development program. Current position classification required supervision of employees under the traditional county system where pay increases were standard with time. However, the Solid Waste Manager is now responsible for evaluating performance on a "Pay for Performance" structure, thus requiring much more discretion and decision making abilities than in the previous structure. This also means having the necessary skills and abilities to lead a team where everyone may not be paid the same, and where control of behaviors and attitudes is essential to productivity.

Project management is involved with any major work or program that is implemented within the department. Landfill cell construction and gas system upgrades are common site improvements, and demand a high level of oversight and direction. Tracking progress, working with contractors, setting timelines, and having weekly meetings ensures compliance and safety standards are all being met during a construction project. Current position classification involves all projects being managed by environmental engineering firms and contracted professionals. The majority of this responsibility has now been taken over by the Solid Waste Manager. These particular projects are multi-million dollar investments for Marathon County, and are essential to the protection of human health and the environment.

It is the responsibility of the Solid Waste Manager to ensure that protection of human health and the environment is the highest priority. The current position classification was determined by factoring in the oversight of 2 landfills, and incoming waste tonnage around 125,000 tons per year. The manager is now responsible for managing 3 landfills at 185,000 tons per year, a hazardous waste program, recycling programs, a fleet of heavy machinery, an intern education program, and a vast multitude of other departmental services. Failure to properly manage the dynamics of a solid waste system can result in unsafe conditions, severe environmental contamination, structural instability, and the potential for loss of human life. It is vital that the Solid Waste Manager understands the importance of the responsibilities associated with the position. 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.

Use additional sheets if necessary

David Hagenbucher *David Hagenbucher*
Employee Signature / Typed Name

April 26, 2017
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:

In 2007 when I first began my work with Marathon County, Eileen Guthrie was moved from her accounting position to that of site supervisor. She had oversight over 2 employees and one contractor. She has no real need to understand the complexities of solid waste management. While this move was functional at best, now in hindsight, one that was unwise. Ms. Guthrie lacked the essential skills to act in the capacity of true landfill operations oversight. Her skillset was best kept at the computer tracking accounting data, not evaluating complex engineering documents or unyielding compliance permits.

When Dave Hagenbucher was hired to replace Ms. Guthrie it was at the same "site supervisor" level." The department was in the process of transitioning from contract operations to that of true county-run operations. There were a few unknowns at that time, but our obligation to serve the nearly 25,000 visitors a year remained front and center. We didn't move forward with the classification at that time because we needed to "run before we had a chance to walk."

Mr. Hagenbucher has taken on the role of operations manager, despite the lack of recognition in classification. His dedication to this department's mission, our team and our 100s of thousands of customer is unmatched. His leadership and commitment to a positive work culture is witnessed by not only our internal employee and customer satisfaction surveys, but also the most recent county culture survey where the SWD scored nearly perfectly in all categories.

While the above noted things are typically not commiserate with a reclassification, they are critical to the effective, efficient and prosperous operations of the facility (and the retention of valued staff).

Mr. Hagenbucher staff responsibilities have grown significantly. He now has 5 full-time staff members reporting to him and up to 4 seasonal employees/interns. He is responsible for setting work goals and continually evaluating performance and compliance. His skill-set is profoundly and overwhelmingly beyond anything that Ms. Guthrie brought to the table as it relates to operating a state of the art solid waste facility. His degree in Waste Management & Soil Science allows us to use less outside consulting. His mastery in understanding engineering documents and ability to share that mastery with his staff has, in some cases, eliminated the need for general services for outside professional engineers. And, while Mr. Hagenbucher enjoys direct operational field work, he knows and accepts the weight of compliance reporting and related work.

I strongly support and endorse this request.

 Meleesa Johnson 4/26/17
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:

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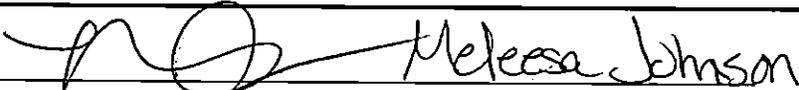
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I strongly support and endorse this request.

 Department Head Signature / Typed Name	<u>4/26/17</u> 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

RECEIVED

APR 28 2017

MARATHON COUNTY
EMPLOYEE RESOURCES DEPT.

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: David Hagenbucher Date Form Completed: April 2017

Official Job Title: Operations Manager Department: Solid Waste

Work Phone: 715-551-5864 Site: Ringle, WI

E-mail: David.Hagenbucher@co.marathon.wi.us Time in Current Position: 2 years 7 months

Immediate Supervisor:

Immediate supervisor reports to:

Name: Meleesa Johnson

Name: Brad Karger

Title: Director of Solid Waste

Title: County Administrator

Work Phone: 715-446-3101

Work Phone: 715-261-1400

E-mail: Meleesa.Johnson@co.marathon.wi.us

E-mail: Brad.Karger@co.marathon.wi.us



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 Solid Waste Department Manager is responsible for overseeing the daily operations of the solid waste facilities and programs that serve customers and communities throughout Central and North-Central Wisconsin. The Solid Waste Manager works directly with more than 30 programs that provide the community with economic vitality, workforce development, education, health and well-being, safety, and recreational opportunities. Work involves developing community waste reduction programs, advising businesses on recycling methods, as well as working with environmental consultants and the State of Wisconsin on large scale environmental cleanups and demolition projects. Continuous effort goes into management and compliance of the site's Wisconsin DNR permits; air management, hazardous waste, and solid waste. State and federal solid waste regulations must be followed to ensure that routine site inspections do not result in violations. Managing approximately 250,000 tons of materials per year means that site safety and customer service are both highly demanding and require ongoing supervision of both customers and staff.

Daily supervision of 6 full time employees involves building a full team mentality, providing motivation, scheduling projects, and setting goals that are in the best interest for the department. Regular meetings, one on one discussion, and rounding are all essential to helping employees function at their highest level, and thus helping the department meet the goals of its strategic plan. Positive feedback and constructive criticism are necessary, and promotion of professional development is a dominant standard. Helping employees learn and grow in their positions aids in the development of the department overall. During summer hours, supervisory responsibilities increase with the addition of 1 LTE, and 3 student interns, requiring the manager to provide direction to 10 employees.

Project management is involved with any major work or program that is implemented within the department. Landfill cell construction and gas system upgrades are common site improvements, and demand a high level of oversight and direction. Tracking progress, working with contractors, setting timelines, and having weekly meetings ensures compliance and safety standards are all being met during a construction project. These particular projects are multi-million dollar investments for Marathon County, and are essential to the protection of human health and the environment.

It is the responsibility of the Solid Waste Manager to ensure that protection of human health and the environment is the highest priority. The Manager must have a clear understanding of landfill science, including biogeochemistry, hydrogeology, and geotechnical properties of soil. Failure to properly manage the dynamics of a solid waste system can result in severe environmental contamination, structural instability, and the potential for loss of human life. Humans can suffer dangerous physiological impacts in the presence of certain waste contaminated environmental conditions. Therefore, prevention of groundwater contamination and air pollution through proper solid waste management will contribute to making Marathon County a healthy and safe place to live.





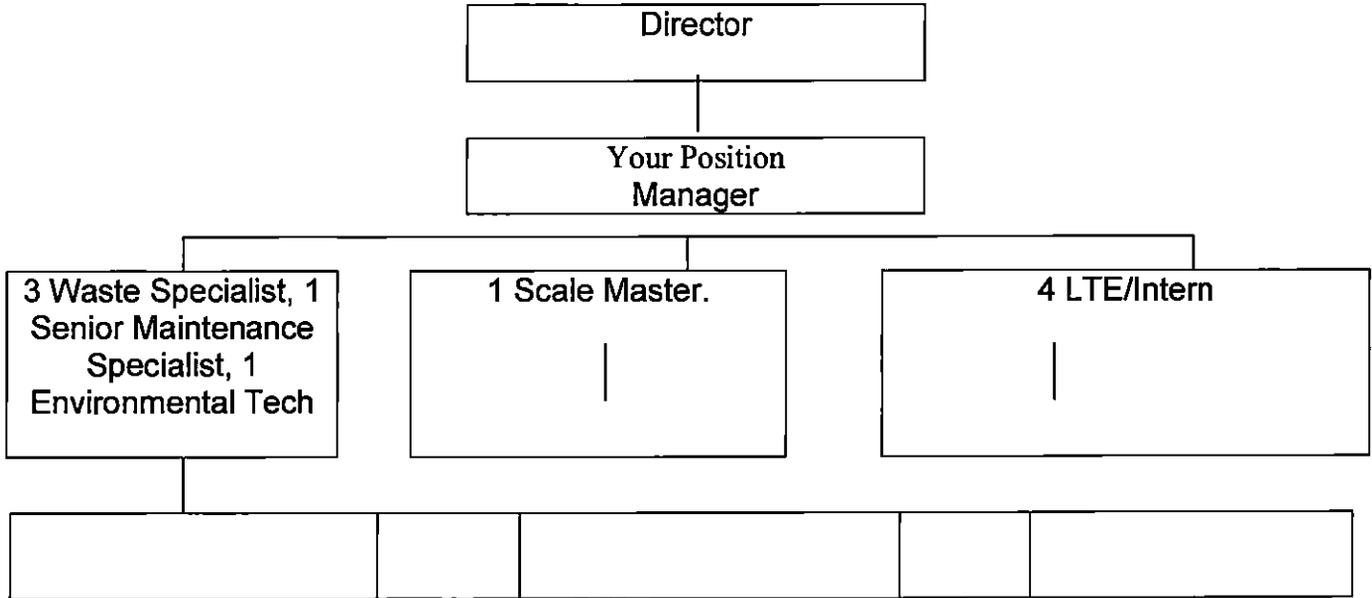
3. SUPERVISORY RESPONSIBILITIES – This is very important.

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.	6	6
<input checked="" type="checkbox"/>	I provide work direction to and review the work of student workers, temporary and/or contract employees.	4	4

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>
I. Daily Operations	a. Monitor incoming traffic and equipment operations to assure the site’s “Plan of Operation” is being followed in accordance with state and federal regulations b. Evaluate issues with traffic, customers, and waste placement and implement innovative solutions and best management practices	Daily	20



	<p>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</p> <p>d. Manage and provide direction to employees working on vegetation, storm water, gas collection, leachate collection, hazardous waste, refuse fill sequencing, and soil relocation</p> <p>e. Meet daily with field liaison to evaluate site conditions and authorize strategies for emerging issues</p> <p>f. Act as direct point of contact for DNR compliance staff and interface with them on a regular basis</p>		
<p>2. Hire, Supervise and Coordinate 6 Full Time Employees and on site personnel</p>	<p>a. Supervise 3 full-time Waste Specialists, 1 full-time Environmental Technician, & 1 full-time Senior Maint. Specialist. Motivate team members and delegate responsibilities for site operation</p> <p>b. Supervise 1 full-time scale operator as vehicles are weighed to ensure proper financial records are being entered and customers are appropriately served</p>	<p>Daily</p>	<p>15</p>



	<p>c. Conduct regular performance evaluations on a pay for performance system</p> <p>d. Determine when an employee needs to be held accountable for negative behavior or actions. Decide when to enact an improvement plan and provide positive progressive discipline</p> <p>e. Oversee up to 25 contracted employees during major site construction projects to ensure deadlines are met, work is done to specifications, and OSHA safety standards are followed daily</p> <p>f. Oversee 3 contracted operators on a daily basis; establish work schedules, responsibilities, and adherence to contract and state laws</p>		
<p>3. Supervision of 3 students and 1 LTE</p>	<p>a. Train, direct, and manage 1 seasonal employee and 3 college interns totaling 2600 combined hours per year</p> <p>b. Train and guide students to become industry leading professionals</p> <p>c. Determine workloads and set goals related to best management practices</p>	<p>Quarterly</p>	<p>5</p>

<p>4. Develop and Implement Site Improvements</p>	<p>a. Use discretion to determine when infrastructure needs upgrading or replacing</p> <p>b. Use creativity and innovation to develop new disposal strategies, pollution management systems, and customer communication techniques</p> <p>c. Strategic thinking involving long term site planning and future expansion locations where certain features cause unique challenges</p>	<p>Annually</p>	<p>10</p>
<p>5. Maintain Growth in Industry Practices</p>	<p>a. Participate on multiple committees and boards that will contribute to industry leading ideas and statewide governance (AROW, SWANA, WCSWMA)</p> <p>b. Maintain regular attendance to industry conferences and training sessions</p> <p>c. Facilitate coaching and professional development opportunities for employees of the department to increase the knowledge and value of the team</p> <p>d. Provide educational opportunities and tours to schools and guest lecture at Universities in Central WI focusing on</p>	<p>Monthly</p>	<p>10</p>



	sustainability and waste diversion		
6. Coordinate and Implement work plans with Engineering Firms	<p>a. Construction planning and management with engineers and WDNR</p> <p>b. Train, oversee, and perform Construction Quality Assurance for engineering firms</p> <p>c. Use discretion in determining if appropriate engineering is being provided</p> <p>d. Review current infrastructure and advise innovative approaches for solving problems</p>	Quarterly	5
7. Business Administration	<p>a. Develop and implement disposal strategies for local businesses and community manufacturers that depend on our service</p> <p>b. Assist haulers and route managers in establishing economic disposal options</p> <p>c. Approve invoices and ensure completion of all related work</p> <p>d. Advise Director on approximate costs of capital improvements and certain budget items</p>	Daily	5
8. Programs Oversight	a. Maintain and manage operation of various dynamic landfill systems including leachate	Daily	10

	<p>systems, gas systems, storage tanks, vegetative areas, and storm-water infrastructure</p> <p>b. Assist in managing department programs including pharmaceutical drop box, recreation, education/outreach, home composting, consulting, hazardous waste, special waste, beneficial reuse, and numerous recycling programs</p> <p>c. Implement a rigorous safety program for operators and site users</p> <p>d. Maintain healthy public relations with the community and customers</p>		
9. Major Investments	<p>a. Develop and distribute Request for Proposals</p> <p>b. Review bids, award contracts, and authorize purchases</p> <p>c. Advise and assist in development of legal contracts</p>	Annually	5
10. Maintain Compliance with Wisconsin Department of Natural Resources Permits	<p>a. Solid Waste, Hazardous Waste, and Air Management Permits management and annual reporting.</p> <p>b. Work directly with WDNR during site inspections to answer technical questions and communicate site</p>	Daily	15

	information relating to regulations and compliance c.Adjust work schedules and set goals for meeting environmental compliance		
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 management and environmental science/engineering including biogeochemistry, hydrogeology, geotechnical properties of soil, microbiology, organic chemistry, geology, soil physics, vegetation, and storm water
2. Knowledge of landfill operating systems and various data collection systems
3. Knowledge of chemical management related to household hazardous waste
4. 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
5. Understanding of bid process, contracts, and legal language
6. Strong understanding of environmental compliance and regulations, environmental policy and law, and business administration
7. Ability to read and interpret engineering drawings and plan sets
8. Very strong motivation and leadership skills
9. Very strong written and oral communication skills
10. Public speaking and public administration
11. Knowledge in encouraging positive working behaviors and attitudes using techniques such as catch & correct and rounding
12. Knowledge in both county and departmental core values and their relationship to an efficient and productive government organization
13. Knowledge in recognizing safety best management practices and implementing programs for maintaining site safety
14. Knowledge of employee performance and accountability
15. Skilled in positive progressive disciplinary techniques
16. Constructive criticism and positive feedback strategies
17. Ability to work in adverse environments and inclement weather
18. Effective in organizing and conducting formal meetings
19. Skilled in operating all equipment used in performing essential functions

- 20. Ability to exercise judgment, decisiveness, and creativity in situations involving evaluating information to problem solve
- 21. Ability to establish effective working relationships with other employees, customers, and the public
- 22. Ability to effectively provide information to staff and delegate responsibilities
- 23. Time management, record keeping, and organizational skills
- 24. Ability to plan, execute, and finalize projects adhering to strict guidelines and budgets
- 25. Ability to work with diverse groups with different cultural norms and financial situations



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 **Soil and Waste Resource Management, Environmental Science, Environmental Engineering (or equivalent).**
- Master's degree in _____
- Other (explain): _____

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

Soil, Waste, and Water Resource Management, Environmental Compliance and Regulations, Environmental Engineering and Science, Environmental Policy and Law, Business Administration, Public Administration, Biogeochemistry, Microbiology, Hydrogeology, Geotechnical properties of Soil, Organic Chemistry, Geology, and Soil Physics





8. EXPERIENCE - This is very important.

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

	Minimum Time Required	
Solid Waste Management	3	years
Environmental Compliance and Regulations	3	years
Environmental Engineering	3	years

9. SPECIAL REQUIREMENTS:

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

Do not use acronyms.

Wisconsin Department of Natural Resources Landfill Manager Certification

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%
Wasteworks (Solid Waste Specific Software)	Seldom 10% - 25%
GEMS Database for Environmental Monitoring and Data Collection	Infrequently <10%
Heavy Equipment (Compactor, dozer, loader, haul truck, skidsteer, excavator)	Seldom 10% - 25%
Systems Control and Data Acquisition (SCADA) System	Infrequently <10%
Nuclear Density Guage, GPS Rover, Flame Ionization Detector, Gas Extraction Monitor.	Seldom 10% - 25%
	Select

11. DECISION-MAKING & JUDGMENTS.

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

1. Deciding when to Expand the Landfill

Deciding when to construct a landfill takes a great deal of problem solving and strategic thinking. Looking into all the details revolving around the construction is extremely significant because available airspace for disposal is something that cannot run out. Community wide contracts, manufacturing businesses, and thousands of people depend on disposal options being available. There are multiple factors that need to be considered when deciding to build a landfill, including site specific characteristics, geological features, existing infrastructure, employee abilities, financial status, safety, upcoming projects, and construction resources. In addition, one very important factor is incoming tonnage compared to the existing airspace. If the decision was made to not build a landfill and the site ran out of disposal space, the situation would cause regional wide confusion and frustration, likely involving loss of numerous contracts and established rates, and the potential for open dumping in unpermitted locations. In the fall of 2015, after looking at compaction rates, airspace utilization, and tonnage, I recommended the investment for a full 10 acre expansion, which was initially against what engineers were suggesting. The time leading up to the 2016 expansion was stressful and challenging due to the lack of available airspace, and when the new cell opened, it was an extraordinary relief, and everyone was thankful for the timing and size of the cell we had decided to construct.

2. Technology Improvements

New technologies and innovations are becoming more common in all industries throughout the nation. The waste management industry is one that is on the leading edge of change, and that forces the department to look at new and innovative solutions to solve its dynamic issues. With stricter regulations, and higher demands for compliance, creative solutions must always be at the top of the priority list. Evaluating when and where to utilize these new technologies to maintain compliance and stay competitive is always a challenging process. An example of this sort of situation can be better understood by reviewing the last few years at the Solid Waste Department. A landfill is most profitable when it can utilize the airspace to its maximum potential. The way this is done is through compaction of the waste mass, and the best compaction is received through GPS technology. In 2015, the Department decided to invest in a GPS system for its landfill equipment. There were a number of factors that caused this to be a challenging decision; what system works with our equipment, what system will work best for our application, replacement part costs, service availability, and what are the capabilities of the software program? I used discretion and strategic thinking to determine what factors are most important for analyzing compaction now and in the future. A multitude of decisions were essential for the development of the final RFP. Those factors were implemented into a prequalification process to ensure that the product we invested in was able to provide us with what we needed. After everything was established, RFPs went out, and we ended up receiving a low bid on a GPS compaction system that met all of our needs.



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%	0--Not Important
Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces.	Infrequently <10%	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%	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.	Infrequently <10%	1--Somewhat Important
Reaching: Extending hand(s) and arm(s) in any direction.	Infrequently <10%	1--Somewhat Important
Standing: Particularly for sustained periods of time.	Seldom 10% - 25%	2--Very Important
Walking: Moving about on foot to accomplish tasks, particularly for long distances.	Moderately 25% - 50%	2--Very Important
Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.	Infrequently <10%	1--Somewhat Important
Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.	Infrequently <10%	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.	Infrequently <10%	0--Not Important



Grasping: Applying pressure to an object with the fingers or palm.	Seldom 10% - 25%	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%	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%	3--Extremely Important
Repetitive Motions: Substantial repetitive movements (motions) of the wrists, hands, and/or fingers.	Seldom 10% - 25%	0--Not 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)	Seldom 10% - 25%
<input checked="" type="checkbox"/>	Hazardous materials (chemicals, blood and other body fluids, etc.)	Seldom 10% - 25%
<input checked="" type="checkbox"/>	Extreme temperatures	Seldom 10% - 25%
<input checked="" type="checkbox"/>	Inadequate lighting	Infrequently <10%
<input checked="" type="checkbox"/>	Work space restricts movement	Infrequently <10%
<input checked="" type="checkbox"/>	Intense noise	Seldom 10% - 25%
<input checked="" type="checkbox"/>	Travel	Seldom 10% - 25%
<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?

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: David Hysbuer Date: 4/26/17

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: 4/20/17

Department Head Signature:  Date: 4/20/17

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

Employee Signature: _____ Date: _____

8/3/17

RECLASSIFICATION AND JOB EVALUATION REQUESTS - 2018

RECLASSIFICATION REQUESTS FOR 2018					RECOMMENDATION		HR, Finance & Property Committee Recommendation 8/7/2017	
Dept	Position #	Employee(s)	Current Position Information: OC/Classification/DBM	Action Requested RECLASS TO:	Fox Lawson Recommendation	Estimated Fiscal Impact		
1	CPZ	34306	Chris Fieri	5122-County Surveyor (B24)	5133-Planning Analyst (C42)	PROPOSE: Pay Level C42, County Surveyor (no change in title)	\$7,407	
2	Corp Counsel	8100	Phyllis Simon	5023-Admin. Coordinator (B23)	5025-Executive Admin. Coordinator (B24)	PROPOSE: Pay Level B24, Executive Administrative Coord.	\$2,436	
3	County Admin.	9002	Mary Palmer	5025-Executive Admin. Coordinator (B24)	5041-Assistant Admin. Manager (C41)	PROPOSE: Pay Level C41, Assistant Administrative Manager	\$3,078	
4	DA	11101	Nancy Solberg	5024-Admin. Supervisor (B31)	5041-Assistant Admin. Manager (C41)	PROPOSE: Pay Level B32, Administrative Supervisor- DA	\$2,745	
5	Finance	13005	Chris Buskirk	5003-Accounting Prof. (C43)	5004-Sr Accounting Prof. (C44)	PROPOSE: Pay Level C44, Senior Accounting Professional	\$907	
6	Solid Waste	27002	David Hagenbucher	5343-Solid Waste Manager (C42)	Upgrade to higher DBM.	PROPOSE: Pay Level C51, Solid Waste Mgr (no change in title)	\$5,087	
						Total cost:	\$21,660	If approved, reclass will be effective 1/1/2018 and included in 2018 budget process.

RESOLUTION

Central Wisconsin Airport Participation in Cooperative Purchasing

WHEREAS, the Central Wisconsin Airport (CWA) follows the Marathon County Procurement Code, §3.01 et seq., General Code of Ordinances of Marathon County; and

WHEREAS, the Airport staff periodically evaluate methods and sources of procurements in order to adhere to procurement policy goals, which include maximizing the purchasing value of public funds and providing safeguards aimed at maintaining a procurement system of quality and integrity; and

WHEREAS, administrative staff at CWA have determined that some procurements of supplies and equipment might be most economically obtained through participation in intergovernmental or inter-entity purchasing cooperatives, and

WHEREAS, §§16.73, 66.0131, and 66.0303(2), Wis. Stats., permit the State of Wisconsin and other political subdivisions to participate in such cooperative purchasing entities with other municipalities, and

WHEREAS, the participation and membership in certain cooperative purchasing entities includes no financial commitment from CWA in the form of dues or fees, and

NOW, THEREFORE, BE IT RESOLVED that the Central Wisconsin Joint Airport Board resolves and ordains as follows:

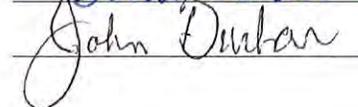
1. To authorize the participation of the Central Wisconsin Airport as a representative/member in the following cooperative purchasing entities:
 - a. Minnesota Cooperative Purchasing Venture (MN CPV)
 - b. National Joint Powers Alliance (NJPA)
 - c. H-GAC Buy

2. Directing that any actual purchases through cooperative purchasing entities be made or completed only after a specific determination by the Airport Administrator, or his or her designee, that the requirements of general Marathon County Procurement Procedure, have been fully complied with in all respects.

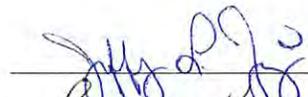
CENTRAL WISCONSIN JOINT AIRPORT BOARD

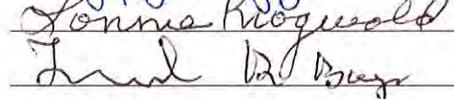


J. Morrow


Sara Guild


John Durbin



Donna Krogstad


Linda B. Beyer

RESOLUTION # R-_____ - 17
APPROVE 2017 BUDGET TRANSFERS FOR MARATHON COUNTY
DEPARTMENT APPROPRIATIONS

WHEREAS, Section 65.90(5)(a) 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

WHEREAS, the Human Resources, Finance and Property Committee has reviewed and does recommend the 2017 transfers listed below, and

NOW, THEREFORE, BE IT RESOLVED the Marathon County Board of Supervisors authorize and direct the budget transfers as listed below:

Transfer from:	Sheriff-Crime Prevention Carryover 101-230
Transfer to:	Sheriff-Crime Prevention Carryover 101-230 Operating supplies
Amount:	\$1,460
Re:	Carry over of actual funds for crime prevention programming

Transfer from:	Sheriff-Drug Endangered Children-Carryover 101-839
Transfer to:	Sheriff-Drug Endangered Children-Carryover 101-839
Amount:	\$20,000
Re:	Carry over of actual funds for drag endangered children programming

Transfer from:	Sheriff-State Grant 204-974
Transfer to:	Sheriff-Small Item Equipment 204-974
Amount:	\$4,000
Re:	TRaCS/Mobilization Grant-grant to assist increase transmission of electronic records to the state as quickly as possible for law enforcement

Transfer from:	Sheriff-State Grant 461-243
Transfer to:	Sheriff- grant expenditures 461-243
Amount:	\$5,450
Re:	State grant-municipal water safety patrol grant

Transfer from:	CPZ-DNR Grant Fenwwood Creek Watershed Project
Transfer to:	CPZ-Fenwood Creek Watershed Project-Direct Payments
Amount:	\$100,000
Re:	DNR grant to provide cost share funds to landowners who implement best practices for soil erosion and water quality protection

That a Class 1 Notice of this transaction be published within (10) days of its adoption;

BE IT FURTHER RESOLVED that the County Board of Supervisors hereby authorizes and directs the Marathon County Clerk to issue checks pursuant to this resolution and the Marathon County Treasurer to honor said checks.

BE IT FURTHER RESOLVED that the proper officers of Marathon County are hereby authorized and directed to take all actions necessary to effect this policy.

Respectfully submitted this 22nd day of August 2017.

HUMAN RESOURCES, FINANCE AND PROPERTY COMMITTEE

_____	_____
_____	_____
_____	_____

Fiscal Note: This resolution modifies the revenues and expenditures for various County funds. There is no additional County levy appropriated in this resolution.

MARATHON COUNTY
Request Authorization for Change in Budget / Transfer of Funds

Instructions for using this form: [This form must be completed and submitted electronically.]
 Email your completed form to Jill Zeinert in Finance, with a "cc" to your Department Head.
 Forms which are incomplete, incorrect, out of balance or have not been "cc'd" to your Department Head
 will be returned to the originating party.

DEPARTMENT: SHERIFF

BUDGET YEAR: 2017

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

From:

Action	Account Number	Account Description	Amount
<input checked="" type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr	101-2301093490	Other Operating Supplies	560
<input checked="" type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr	101-2307093490	Other Operating Supplies	900
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr			
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr		Adjust Estimated to Actual Carry Over	
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr		Crime Prevention and Safety	
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr			
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr			
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr			

To:

Action	Account Number	Account Description	Amount
<input type="checkbox"/> Exp Incr <input checked="" type="checkbox"/> Rev Decr	101-2301089900	Transfers From Fund Balance	560
<input type="checkbox"/> Exp Incr <input checked="" type="checkbox"/> Rev Decr	101-2307089900	Transfers From Fund Balance	900
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			

Requested By (Dept Head or Designee): **Sheriff Scott Parks**

Date: 4/27/2017

Funds Available, Verified By: _____ Date: _____

Authorized/Approved By Finance, Property & Facilities Committee Minutes: Date _____

Transfer Entered By: _____ Date: _____

MARATHON COUNTY

Request Authorization for Change in Budget/Transfer of Funds—Supplemental Information

NOTE: Attach this supplemental information to the original Change in Budget/Transfer of Funds form. All questions must be completed by the requesting department, or the Transfer form will be returned.

1. What is the Name of this Program/Grant? (Do NOT use abbreviations or acronyms)

Crime Prevention and Safety

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

Funding for Hunter Safety program and other Community Safety educational supplies

3. This Program is (check one only):

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, 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 text.](#)

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 the non-cash match below):

[Click here to enter text.](#)

6. Does this Transfer Request increase any General Ledger Account Code in the 8000's (Capital Outlay)?

No.

Yes, the Amount is Less than \$30,000.

Yes, the Amount is \$30,000 or more AND (check one box):

The capital request HAS been approved by the CIP Committee.

The capital request HAS NOT been approved by the CIP Committee.

FOR FINANCE DEPARTMENT USE ONLY:

10% of program, appropriation unit or fund? Yes No Budget Transfer Resolution Required? Yes No

MARATHON COUNTY
Request Authorization for Change in Budget / Transfer of Funds

Instructions for using this form: [This form must be completed and submitted electronically.]
 Email your completed form to Jill Zeinert in Finance, with a "cc" to your Department Head.
 Forms which are incomplete, incorrect, out of balance or have not been "cc'd" to your Department Head
 will be returned to the originating party.

DEPARTMENT: SHERIFF

BUDGET YEAR: 2017

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

From:

Action	Account Number	Account Description	Amount
<input checked="" type="checkbox"/> Exp Decr <input checked="" type="checkbox"/> Rev Incr	101-83993190	Office Supplies	10,000
<input checked="" type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr	101-83993480	Educational Supplies	10,000
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr			
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr		Adjust Estimated to Actual Carry Over Balance	
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr		Drug Endangered Children Donations	
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr			
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr			
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr			

To:

Action	Account Number	Account Description	Amount
<input type="checkbox"/> Exp Incr <input checked="" type="checkbox"/> Rev Decr	101-83989900	Transfers from Fund Balance	20,000
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			

Requested By (Dept Head or Designee): **Sheriff Scott Parks**

Date: 4/27/2017

Funds Available, Verified By: _____ Date: _____

Authorized/Approved By Finance, Property & Facilities Committee Minutes: Date _____

Transfer Entered By: _____ Date: _____

MARATHON COUNTY

Request Authorization for Change in Budget/Transfer of Funds—Supplemental Information

NOTE: Attach this supplemental information to the original Change in Budget/Transfer of Funds form. All questions must be completed by the requesting department, or the Transfer form will be returned.

1. What is the Name of this Program/Grant? (Do NOT use abbreviations or acronyms)

Donations – Drug Endangered Children

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

Provides Community Education about Drug Endangered Children, and provides the children with backpacks and blankets when they are removed from homes.

3. This Program is (check one only):

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, 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 text.](#)

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 the non-cash match below):

[Click here to enter text.](#)

6. Does this Transfer Request increase any General Ledger Account Code in the 8000’s (Capital Outlay)?

No.

Yes, the Amount is Less than \$30,000.

Yes, the Amount is \$30,000 or more AND (check one box):

The capital request HAS been approved by the CIP Committee.

The capital request HAS NOT been approved by the CIP Committee.

FOR FINANCE DEPARTMENT USE ONLY:

10% of program, appropriation unit or fund? Yes No Budget Transfer Resolution Required? Yes 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's Office

BUDGET YEAR: 2017

TRANSFER FROM:

Action	Account Number	Account Description	Amount
Revenue Increase	204-97482320	Public Safety – State Grant	4,000

TRANSFER TO:

Action	Account Number	Account Description	Amount
Expenditure Increase	204-97493140	Small Items Equipment	4,000

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: Kristin Williams – Administrative Services Manager

Date Completed: 7/26/2017

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)

TRaCS / Mobilization Equipment Grant

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

This grant program will assist law enforcement in developing their capacity to enter and transmit the greatest possible number of electronic records to the State of Wisconsin as soon as possible. This will increase the number of electronic citations and crash reports submitted and it will expand the ability to use and share the electronic data for problem identification, program development and resource allocation.

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? Yes

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's Office

BUDGET YEAR: 2017

TRANSFER FROM:

Action	Account Number	Account Description	Amount
Revenue Increase	461-24382424	Boating Enforcement – State Grant	5,450

TRANSFER TO:

Action	Account Number	Account Description	Amount
Expenditure Increase	461-24391220	Wages – Permanent - Overtime	4,900
Expenditure Increase	461-24392420	Other Machinery/Equip	50
Expenditure Increase	461-24393620	Consumable Tools/Supplies	500

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: Kristin Williams – Administrative Services Manager

Date Completed: 8/3/2017

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)
Municipal Water Safety Patrol State Aid

- 2) Provide a brief (2-3 sentence) description of what this program does.
Water Safety Patrol for Lake DuBay, Wisconsin River and Lake Wausau

- 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? Yes

MARATHON COUNTY

Request Authorization for Change in Budget / Transfer of Funds

Instructions for using this form: [This form must be completed and submitted electronically.]

Email your completed form to Jill Zeinert in Finance, with a "cc" to your Department Head.

Forms which are incomplete, incorrect, out of balance or have not been "cc'd" to your Department Head will be returned to the originating party.

DEPARTMENT: CONSERVATION, PLANNING & ZONING

BUDGET YEAR: 2017

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

From:

Action	Account Number	Account Description	Amount
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr	Click to enter GL	DNR Fenwood Creek Watershed Project	Enter amount
<input type="checkbox"/> Exp Decr <input checked="" type="checkbox"/> Rev Incr	Click to enter GL	DNR Grant	100,000
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr	Click to enter GL	Click here to enter text.	Enter amount
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr	Click to enter GL	Click here to enter text.	Enter amount
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr	Click to enter GL	Click here to enter text.	Enter amount
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr	Click to enter GL	Click here to enter text.	Enter amount
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr	Click to enter GL	Click here to enter text.	Enter amount
<input type="checkbox"/> Exp Decr <input type="checkbox"/> Rev Incr	Click to enter GL	Click here to enter text.	Enter amount

To:

Action	Account Number	Account Description	Amount
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr	Click to enter GL	DNR Fenwood Creek Watershed Project	Enter amount
<input checked="" type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr	xxx-xxx-9-7170	Direct Payments	100,000
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			
<input type="checkbox"/> Exp Incr <input type="checkbox"/> Rev Decr			

Requested By (Dept Head or Designee): Rebecca Frisch

Date: 8/1/2017

Funds Available, Verified By: _____ Date: _____

Authorized/Approved By Finance, Property & Facilities Committee Minutes: Date _____

Transfer Entered By: _____ Date: _____

MARATHON COUNTY

Request Authorization for Change in Budget/Transfer of Funds—Supplemental Information

NOTE: Attach this supplemental information to the original Change in Budget/Transfer of Funds form. All questions must be completed by the requesting department, or the Transfer form will be returned.

1. What is the Name of this Program/Grant? (Do NOT use abbreviations or acronyms)

Department of Natural Resources Grant

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

The Department of Natural Resources, through the United States Environmental Protection Agency, provides funds to counties to implement best management practices. These funds can be utilized for cost share funds to landowners who implement best management practices for soil erosion and water quality protection.

3. This Program is (check one only):

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, 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 text.](#)

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 the non-cash match below):

Staff time

6. Does this Transfer Request increase any General Ledger Account Code in the 8000’s (Capital Outlay)?

No.

Yes, the Amount is Less than \$30,000.

Yes, the Amount is \$30,000 or more AND (check one box):

The capital request HAS been approved by the CIP Committee.

The capital request HAS NOT been approved by the CIP Committee.

FOR FINANCE DEPARTMENT USE ONLY:

10% of program, appropriation unit or fund? Yes No Budget Transfer Resolution Required? Yes 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: Veterans

BUDGET YEAR: 2017

TRANSFER FROM:

Action	Account Number	Account Description	Amount
Revenue Increase	101-55689900	FUND BALANCE	27,285

TRANSFER TO:

Action	Account Number	Account Description	Amount
Expenditure Increase	101-55697170	DIRECT PAYMENTS	27,285.09

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: SCOTT BERGER

Date Completed: 7/20/2017

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)

VETERANS RELIEF FUND

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

AID TO NEED VETERANS

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

**DRAFT
RESOLUTION R- _____ - 17**

AFFIRMING SUPPORT FOR A SIXTH CIRCUIT COURT JUDGE FOR MARATHON COUNTY

WHEREAS, the Director of State Courts of the Wisconsin Supreme Court has informed the Marathon County Board of Supervisors that the Marathon County Circuit Court caseload, based on the final 2016 Wisconsin Weighted Caseload Study, indicates a current need for seven (7) judges in Marathon County; and

WHEREAS, Marathon County is currently authorized five circuit court judges; and

WHEREAS, the Director of State Courts has indicated to the Chief Judge of the Ninth Judicial District that his office has begun the process of pursuing new circuit court judgeships through introduction of a judgeship bill in this legislative session; and

WHEREAS, Marathon County's judge need has been identified as one of the highest in the state and is specifically mentioned as one of the counties that to be included within the judgeship bill; and

WHEREAS, the Director of State Courts has specifically requested that local officials from each of the identified counties express their interest and willingness to provide the necessary infrastructure and funding necessary to support an additional judgeship in the form of a formal county board resolution; and

WHEREAS, Marathon County recognizes the need for an additional circuit court judge to ensure the efficient and effective administration of our court system.

NOW, THEREFORE BE IT RESOLVED that the Board of Supervisors of the County of Marathon hereby requests the Director of State Courts to request the Wisconsin State Legislature to allocate a sixth judgeship for Marathon County; and

BE IT FURTHER RESOLVED that the Board of Supervisors reaffirms that it will provide the necessary infrastructure and funding necessary for support of a sixth circuit judge.

Dated this ____ day of _____, 2017.

PUBLIC SAFETY COMMITTEE

FISCAL IMPACT ESTIMATE (2013 projections): Maximum staff anticipated is one courtroom clerk and one judicial assistant:

Clerk gross salary and benefits: \$55,967

Judicial Assistant gross salary and benefits: \$61,020

If a sixth judgeship is created, Marathon County would receive the court support grant base amount of \$42,275 per year times six judges rather than five judges.

The addition of a sixth judge will result in the need to construct a sixth permanent courtroom.