

**Milwaukee County Personnel Review Board**  
**Meeting Minutes – May 26, 2015**

**I. Roll Call**

Board President Daniel Dennehy called to order the regular meeting of the Personnel Review Board at 9:02 a.m. on Tuesday, May 26, 2015, in Room 203-R of the Milwaukee County Courthouse.

The following Board Members were present: Mr. Dennehy, Ms. Susan A. Lueger, Ms. Mary K. Bruno, and Mr. Carlos Pastrana. Ms. Melissa Soberalski was excused.

**II. Approval of the Minutes of the May 12, 2015 Meeting**

Ms. Bruno moved, Ms. Lueger seconded, and the Board, by vote of 4-0, approved the minutes of the May 12, 2015 meeting.

**III. Communications and/or comments from the public, if any**

None.

**IV. Correspondence**

None.

**V. First Appearances**

**A. DISCHARGES**

**DILLON BRIESEMEISTER, Firefighter Equipment Operator, DOT  
Case #2-4217, dated 05/15/2015**

The Board heard the report of Michael Phillips, Cross Law Firm, S.C., that Dillon Briesemeister, who was not present, waived his right to a hearing within 21 days and requested a hearing date certain. Molly Zillig, Assistant Corporation Counsel, requested that the Board schedule the matter for an update at its next meeting; however, the Board determined to schedule a hearing certain, and the parties could request a continuance if necessary and based on witness availability. Ms. Bruno moved, Ms. Lueger seconded, and the Board, by unanimous vote (4-0) scheduled the matter for hearing certain on June 23, 2015.

**CAROL LASKA, Correctional Officer I, HOC  
Case #2-4215, dated 5/12/2015, for HOC IA # 15-029  
Case #2-4216, dated 5/12/2015, for HOC IA #15-030**

The Board heard the report of David Eisner, AFSCME District Council 32, that Carol Laska, who was not present, waived her right to a hearing within 21 days, authorized AFSCME, District Council 32 to represent her in this matter, and requested a hearing date certain. Molly Zillig, Assistant Corporation Counsel, concurred and requested the matters be scheduled for July 7, 2015. Ms. Bruno moved, Ms. Lueger seconded, and the Board, by unanimous vote (4-0) scheduled the matters for hearing certain on July 7, 2015.

**B. SUSPENSIONS****QUIVON DILLON, Correction Officer 1, SHERIFF****Case #1-4193, dated 05/19/2015 for IA #15-087 for 10 days****Case #1-4202, dated 05/19/2015 for IA #15-088 for 15 days****Case #1-4218, dated 02/26/2015 for IA #14-298 for 25 days****Case #1-4219, dated 04/02/2015 for IA #15-017 for 30 days**

The Board heard the report of David Eisner, AFSCME, District Council 32, that Quivon Dillon, who was not present, waived his right to a hearing within 21 days, authorized AFSCME, District Council 32 to represent him in this matter, and requested a hearing date certain for these matters as well as Cases 1-4218 and 1-4219, which were scheduled for hearing today. Molly Zillig, Assistant Corporation Counsel, concurred in consolidating all four cases and requested all matters be set for July 7, 2015. Ms. Bruno moved, Mr. Pastrana seconded, and the Board, by unanimous vote (4-0) scheduled all four matters (Cases 1-4193, 1-4202, 1-4218, and 1-4219) for hearing certain on July 7, 2015.

**VI. Hearings****A. DISCHARGE****JUTTA HOLT, Clerical Assistant II, SHERIFF****Case #2-4204, dated 03/26/2011 for IA #14-247**

The Board heard the report of David Eisner, Staff Representative, AFSCME, District Council 32, that Jutta Holt was working with her private attorney to settle this matter as well as certain claims against Milwaukee County. Molly Zillig, Assistant Corporation Counsel, confirmed that the County and Ms. Holt had come to an agreement, but time needed to pass before the arrangement would be final. Ms. Bruno moved, Ms. Lueger seconded, and the Board, by unanimous vote, rescheduled this matter for an update on July 7, 2015.

**B. SUSPENSIONS****QUIVON DILLION, Deputy Sheriff, SHERIFF****Case #1-4218, dated 02/26/2015 for IA #14-298 for 25 days****Case #1-4219, dated 04/02/2015 for IA #15-017 for 30 days***(See above, item V.B.)***VII. Adjournment**

Ms. Lueger moved, Mr. Pastrana seconded, and the Board, by unanimous vote (4-0), adjourned the meeting at 9:20 a.m.

Minutes submitted by: Rebecca M. Janz, PRB/Ethics Board Administrator

**Milwaukee County Personnel Review Board**  
**Meeting Minutes – June 9, 2015**

**I. Roll Call**

Board President Daniel Dennehy called to order the regular meeting of the Personnel Review Board at 9:00 a.m. on Tuesday, June 9, 2015, in Room 306 of the Milwaukee County Courthouse.

The following Board Members were present: Mr. Dennehy, Ms. Susan A. Lueger, Ms. Mary K. Bruno, and Mr. Carlos Pastrana. Ms. Melissa Soberalski arrived at 9:05 a.m. and left at 9:30 a.m.

**II. Approval of the Minutes of the May 26, 2015 Meeting**

Ms. Bruno moved, Ms. Lueger seconded, and the Board, by vote of 4-0, approved the minutes of the May 26, 2015 meeting.

**III. Communications and/or comments from the public, if any**

None.

**IV. Correspondence**

Molly Zillig, Assistant Corporation Counsel, contacted the Board via email to move the matter of Dillon Briesemeister, Case #2-4217, to the call of the chair while the parties resolved some additional matters. Mr. Briesemeister's attorney also emailed the Board that he concurred with the request. Ms. Bruno moved, Ms. Lueger seconded, and the Board, by unanimous vote (4-0), to place the Dillon Briesemeister matter to the call of the chair.

**V. First Appearances**

**A. DISCHARGES**

**NEAL GOAD, Facilities Worker 2, DAS  
Case #2-4224, dated 05/21/2015**

The Board heard the report of David Eisner, AFSCME District Council 32, that Neal Goad, who was present, waived his right to a hearing within 21 days and requested a hearing date certain. Ms. Bruno moved, Mr. Pastrana seconded, and the Board, by unanimous vote (5-0) scheduled the matter for hearing certain on July 21, 2015.

**B. SUSPENSIONS**

**VICTORIA MIKULA, Deputy Sheriff 1, SHERIFF  
Case #1-4220, dated 05/20/2015 for IA #15-026 for 25 days**

The Board heard the report of Ryan MacGillis, MacGillis Wiemer, that Victoria Mikula, who was not present, waived her right to a hearing within 21 days, authorized MacGillis Wiemer to represent her in this matter, and requested a hearing date certain. Ms. Bruno moved, Mr. Pastrana seconded, and the Board, by unanimous vote (5-0) scheduled the matter for hearing certain on July 21, 2015.

**PATRICIA SWAYKA, Correction Officer I, SHERIFF****Case #1-4221, dated 05/20/2015 for IA #15-053 for 27 days**

The Board heard the report of David Eisner, AFSCME District Council 32, that Patricia Swayka, who was not present, waived her right to a hearing within 21 days and requested a hearing date certain. Paul Kuglitsch, Assistant Corporation Counsel requested the hearing be set for August 18, 2015; however, the Board determined a sooner date was more appropriate. Ms. Bruno moved, Ms. Lueger seconded, and the Board, by unanimous vote (5-0) scheduled the matter for hearing certain on June 23, 2015.

**JAMIE SEIDL, Correction Officer I, SHERIFF****Case #1-4221, dated 05/20/2015 for IA #15-075 for 20 days**

The Board heard the report of Paul Kuglitsch, Assistant Corporation Counsel, that Jamie Seidl, who was not present or represented, waived her right to a hearing within 21 days and requested a hearing date certain. The Office of the Board confirmed that it received correspondence from Ms. Seidl stating the same. Ms. Bruno moved, Mr. Pastrana seconded, and the Board, by unanimous vote (5-0) scheduled the matter for hearing certain on July 21, 2015.

**TROY MOORE-SPICER, Correction Officer I, SHERIFF****Case #1-4223, dated 05/20/2015 for IA #15-081 for 25 days**

The Board heard the report of David Eisner, AFSCME District Council 32, that Troy Moore-Spicer, who was present, waived his right to a hearing within 21 days and requested a hearing date certain. Ms. Bruno moved, Ms. Lueger seconded, and the Board, by unanimous vote (5-0) scheduled the matter for hearing certain on July 21, 2015.

**VI. Updates****A. DISCHARGE****JUDITH TAYLOR, Clerical Assistant II, DHHS****Case #2-4210, dated 04/23/2015**

The Board heard the report of David Eisner, Staff Representative, AFSCME, District Council 32, that Judith Taylor retired from her position with Milwaukee County. Paul Kuglitsch, Assistant Corporation Counsel, confirmed that Ms. Taylor retired. The Board recognized the retirement and closed the case.

**B. GRIEVANCE****JASON JAHN, Technical Architect, IMSD****Case #4-4208, dated 03/04/2015**

The Board heard additional arguments from Paul Kuglitsch, Assistant Corporation Counsel, and Jason Jahn regarding whether the Board had jurisdiction of Mr. Jahn's grievance appeal. The Board determined to lay over the matter to its next meeting to properly notice a closed session discussion of the matter.

## **VII. Hearings**

### **A. DISCHARGE**

**FRED WILLIAMS, Correction Officer I, SHERIFF**

**Case #2-4206, dated 04/02/2015 for IA #15-022**

**Case #2-4207, dated 04/02/2015 for IA #15-045**

The Board heard the report of David Eisner, .Staff Representative, AFSCME, District Council 32, that Fred Williams resigned effective today, June 9, 2015. The Office of the Board confirmed it received notice of Mr. Williams' resignation. The Board recognized Mr. Williams' resignation and closed the case.

**OSCAR RUSH, Facilities Worker Security, SHERIFF**

**Case #2-4209, dated 04/10/2015 for IA #15-057**

The Board heard the request of Paul Kuglitsch, Assistant Corporation Counsel, to move this matter to the call of the chair while Mr. Rush sought another position with the County. David Eisner, .Staff Representative, AFSCME, District Council 32, concurred. Ms. Bruno moved, Ms. Lueger seconded, and the Board by unanimous vote (5-0) placed this matter at the call of the chair.

## **VIII. Adjournment**

Ms. Lueger moved, Ms. Bruno seconded, and the Board, by unanimous vote (4-0), adjourned the meeting at 9:33 a.m.

Minutes submitted by: Rebecca M. Janz, PRB/Ethics Board Administrator

**Milwaukee County Personnel Review Board**  
**Meeting Minutes – June 23, 2015**

**I. Roll Call**

Board President Daniel Dennehy called to order the regular meeting of the Personnel Review Board at 8:59 a.m. on Tuesday, June 23, 2015, in Room 203-R of the Milwaukee County Courthouse.

The following Board Members were present: Mr. Dennehy, Ms. Susan A. Lueger, Ms. Melissa Soberalski, and Mr. Carlos Pastrana. Ms. Mary K. Bruno was excused.

**II. Approval of the Minutes of the June 9, 2015 Meeting**

Mr. Pastrana moved, Ms. Lueger seconded, and the Board, by vote of 4-0, approved the minutes of the June 9, 2015 meeting.

**III. Communications and/or comments from the public, if any**

None.

**IV. Correspondence**

All correspondence received by the Office of the Personnel Review Board related to matters scheduled on the agenda for the meeting and accordingly was discussed with the matters as scheduled.

**V. First Appearances**

**A. DISCHARGES**

**HARRIET FORD, Administrative Assistant NR, AGING  
Case #2-4229, dated 06/10/2015**

The Board heard the report of Molly Zillig, Assistant Corporation Counsel that Harriet Ford, who was not present, resigned from County service as of June 16, 2015. The Office of the Personnel Review Board confirmed that it received Ms. Ford's resignation. The Board recognized Ms. Ford's resignation and closed the case.

**B. SUSPENSIONS**

**DANIEL BRODSKY, Correction Officer 1, SHERIFF  
Case #1-4225, dated 06/10/2015 for IA #15-002 for 30 days**

The Board heard the report of Molly Zillig, Assistant Corporation Counsel, that Daniel Brodsky, who was not present, waived his right to a hearing and accepted his suspension. The Office of the Personnel Review Board confirmed receipt of Mr. Brodsky's waiver. Mr. Pastrana moved, Ms. Soberalski seconded, and the Board, by unanimous vote (4-0), accepted Mr. Brodsky's waiver and closed the case.

**MICHAEL HANNAH, Correction Officer 1, SHERIFF****Case #1-4226, dated 06/10/2015 for IA #15-002 for 15 days**

The Board heard the report of Molly Zillig, Assistant Corporation Counsel, that Michael Hannah, who was not present, waived his right to a hearing and accepted his suspension. The Office of the Personnel Review Board confirmed receipt of Mr. Hannah's waiver. Mr. Pastrana moved, Ms. Soberalski seconded, and the Board, by unanimous vote (4-0), accepted Mr. Hannah's waiver and closed the case.

**WHITNEY HENDON, Correction Officer 1, SHERIFF****Case #1-4228, dated 06/10/2015 for IA #15-002 for 15 days**

The Board heard the report of Molly Zillig, Assistant Corporation Counsel, that Whitney Hendon, who was not present, waived her right to a hearing and accepted her suspension. The Office of the Personnel Review Board confirmed receipt of Ms. Hendon's waiver. Ms. Lueger moved, Mr. Pastrana seconded, and the Board, by unanimous vote (4-0), accepted Ms. Hendon's waiver and closed the case.

**KEYANDRE CLAYTON, Correction Officer 1, SHERIFF****Case #1-4227, dated 06/10/2015 for IA #15-002 for 15 days**

The Board heard the report of Molly Zillig, Assistant Corporation Counsel, that Keyandre Clayton, who was not present, waived his right to a hearing and accepted his suspension. The Office of the Personnel Review Board confirmed receipt of Mr. Clayton's waiver. Ms. Soberalski moved, Ms. Lueger seconded, and the Board, by unanimous vote (4-0), accepted Mr. Clayton's waiver and closed the case.

**VI. Updates****A. DISCHARGE****RODNEY BROWN, Forensic Investigator, MEDICAL EXAMINER****Case #2-4179, dated 01/22/2015**

The Board heard the report of Paul Kuglitsch, Assistant Corporation Counsel that Rodney Brown resigned from his position with Milwaukee County. The Office of the Personnel Review Board confirmed receipt of Mr. Brown's resignation. The Board recognized the resignation and closed the case.

**SHEILA CLAYTON, Clerical Assistant, COMPTROLLER****Case #2-4166, dated 11/17/2014**

The Board heard the report of David Eisner, Staff Representative, AFSCME, District Council 32 that Sheila Clayton applied for disability retirement in November. Paul Kuglitsch, Assistant Corporation Counsel, confirmed that Ms. Clayton applied for emergency retirement and that her retirement was effective as of June 22, 2015. The Board recognized Ms. Clayton's retirement and closed the case.

**DONNA FLEES, Paralegal, FAMILY CARE****Case #2-4184, dated 02/05/2015**

The Board heard the report of David Eisner, Staff Representative, AFSCME, District Council 32 that Donna Flees had resigned from her position with Milwaukee County. Molly Zillig, Assistant Corporation Counsel, confirmed that Ms. Flees has resigned

effective as of today's date. The Board recognized Ms. Flees' resignation and closed the case

## **VII. Hearings**

### **A. DISCHARGE**

**MARQUIS JOHNSON, Juvenile Correction Officer, DHHS  
Case #2-4214, dated 04/30/2015**

*At 10:19 a.m., Ms. Lueger moved, Ms. Soberalski seconded, and the Board voted 4-0 to go into closed session to deliberate the Marquis Johnson and Jason Jahn matters. The Board deliberated the Marquis Johnson matter until 10:36 a.m., at which point Ms. Soberalski left the meeting and the remaining three Board members deliberated the Jason Jahn matter. At 10:56 a.m., the Board reconvened in open session.*

Ms. Lueger moved, Ms. Soberalski seconded, and the Board, by unanimous vote (4-0), found that the evidence was sufficient to sustain violations of Civil Service Rule VII, Section 4(1), paragraphs (o) and (t), and upheld the discharge of Mr. Johnson.

### **B. SUSPENSION AND DISCHARGE**

**NOLAN GAIOVNIK, Correction Officer 1, SHERIFF  
Case #1-4211, dated 04/30/2015 for IA #15-071 for 60 days  
Case #2-4212, dated 05/04/2015 for IA #15-090**

The Board heard the request of Molly Zillig, Assistant Corporation Counsel, to reschedule both cases due to a witness's unavailability today due to a medical emergency. David Eisner, Staff Representative, AFSCME, District Council 32, concurred with rescheduling both cases. Mr. Pastrana moved, Ms. Lueger seconded, and the Board, by unanimous vote (4-0), rescheduled both cases for hearing certain on July 7, 2015.

### **C. SUSPENSION**

**PATRICIA SWAYKA, Correction Officer I, SHERIFF  
Case #1-4221, dated 05/20/2015 for IA #15-053 for 27 days**

The Board heard the report of David Eisner, AFSCME District Council 32, that Patricia Swayka, who was not present, had been called up to active military service and was unable to attend today's hearing. The Office of the Personnel Review Board confirmed that Ms. Swayka also informed the Office of this fact and that Ms. Swayka would be available after July 2, 2015. Mr. Pastrana moved, Ms. Lueger seconded, and the Board, by unanimous vote (4-0), rescheduled the matter for hearing certain on August 4, 2015.

### **D. GRIEVANCE**

**JASON JAHN, Technical Architect, IMSD  
Case #4-4208, dated 03/04/2015**

*At 10:19 a.m., Ms. Lueger moved, Ms. Soberalski seconded, and the Board voted 4-0 to go into closed session to deliberate the Marquis Johnson and Jason Jahn matters.*

*The Board deliberated the Marquis Johnson matter until 10:36 a.m., at which point Ms. Soberalski left the meeting and the remaining three Board members deliberated the Jason Jahn matter. At 10:56 a.m., the Board reconvened in open session.*

Mr. Dennehy moved, Ms. Lueger seconded, and the Board, by unanimous vote (3-0), declined to determine at this time whether it has jurisdiction of this matter because the issue of annual step increases in Chapter 17.10 of the Milwaukee County Code of General Ordinances is before the Milwaukee County Board of Supervisors and the Board of Supervisors is the appropriate body to resolve the matter. The Board accordingly dismissed the grievance and closed the case.

#### **VIII. Report of the PRB Administrator Regarding 2016 Budget and Legal Services**

The Board heard the report of Rebecca M. Janz, Administrator, regarding the 2016 budget request sent to the County Executive's office and regarding a potential request for proposals for legal services. The Board asked Ms. Janz to provide a draft request to the Board at the July 21, 2015.

#### **IX. Adjournment**

Mr. Pastrana moved, Ms. Lueger seconded, and the Board, by unanimous vote (4-0), adjourned the meeting at 10:57 a.m.

Minutes submitted by: Rebecca M. Janz, PRB/Ethics Board Administrator

**Milwaukee County Personnel Review Board**  
**Meeting Minutes – July 7, 2015**

**I. Roll Call**

Board President Daniel Dennehy called to order the regular meeting of the Personnel Review Board at 9:00 a.m. on Tuesday, July 7, 2015, in Room 203-R of the Milwaukee County Courthouse.

The following Board Members were present: Mr. Dennehy, Ms. Melissa Soberalski, and Ms. Mary K. Bruno. Ms. Susan A. Lueger and Mr. Carlos Pastrana were excused.

**II. Approval of the Minutes of the June 23, 2015 Meeting**

Rebecca M. Janz, Administrator, noted that there were errors in the minutes regarding the motion for adjournment of the June 23, 2015 meeting. The Board acknowledged the corrections, and Ms. Bruno moved, Ms. Soberalski seconded, and the Board, by vote of 3-0, approved the minutes of the June 23, 2015 meeting as corrected.

**III. Communications and/or comments from the public, if any**

None.

**IV. Correspondence**

None.

**V. First Appearances**

**A. DISCHARGES**

**CORRINE EHMKE, Correction Officer I, SHERIFF**

**Case #2-4231, dated 06/29/2015 for IA #15-148**

The Board heard the report of David Eisner, Staff Representative, AFSCME, District Council 32, that Corrine Ehmke, who was not present, waived her right to a hearing within 21 days, authorized the union to represent her, and requested a hearing date certain. Attorney Paul Kuglitsch, Assistant Corporation Counsel, stated he also spoke with Ms. Ehmke and Mr. Eisner regarding the hearing date and requested the matter be set for August 18, 2015. Ms. Bruno moved, Ms. Soberalski seconded, and the Board, by unanimous vote (3-0), scheduled the matter for hearing certain on August 18, 2015.

**JEFFERY STRICKEL, Mechanic, DOT**

**Case #2-4230, dated 06/16/2015**

The Board heard the report of Attorney Paul Kuglitsch, Assistant Corporation Counsel, that Jeffery Strickel resigned from County service effective July 2, 2015. The Office of the Board confirmed it received the resignation. The Board recognized Mr. Strickel's resignation and closed the case.

## **VI. Updates**

### **A. DISCHARGE**

#### **NEAL GOAD, Facilities Worker 2, DAS**

**Case #2-4224, dated 05/21/2015**

The Board heard the report of Paul Kuglitsch, Assistant Corporation Counsel that the appointing authority will not be able to produce a key witness on July 21, 2015, which is the current date for Mr. Goad's hearing. Attorney Brenda Lewison, Law Office of Arthur Heitzer, agreed and requested the matter be set for August 18, 2015, due to scheduling concerns. Ms. Bruno moved, Ms. Soberalski seconded, and the Board, by unanimous vote (3-0), rescheduled the matter for hearing certain on August 18, 2015.

## **VII. Hearings**

### **A. DISCHARGE**

#### **JUTTA HOLT, Clerical Assistant II, SHERIFF**

**Case #2-4204, dated 04/02/2015 for IA #14-247**

The Board heard the report of Paul Kuglitsch, Assistant Corporation Counsel that Jutta Holt resigned from County service effective June 23, 2015. David Eisner, Staff Representative, AFSCME, District Council 32, confirmed. The Board acknowledged Ms. Holt's resignation and closed the case.

#### **CAROL LASKA, Correction Officer I, HOC**

**Case #2-4215, dated 05/12/2015 for HOC IA #15-029**

**Case #2-4216, dated 05/12/2015 for HOC IA #15-030**

*At 4:08 p.m., Ms. Bruno moved, Ms. Soberalski seconded, and the Board voted 3-0 to go into closed session to deliberate the Carol Laska and Nolan Gaiovnik matters. At 4:23 p.m., the Board reconvened in open session.*

Ms. Bruno moved, Ms. Soberalski seconded, and the Board, by unanimous vote (3-0), found that the evidence was sufficient to sustain violations of Civil Service Rule VII, Section 4(1), paragraphs (1) and (o), and upheld both discharges of Ms. Laska.

### **B. SUSPENSION AND DISCHARGE**

#### **NOLAN GAIOVNIK, Correction Officer 1, SHERIFF**

**Case #1-4211, dated 04/30/2015 for IA #15-071 for 60 days**

**Case #2-4212, dated 05/04/2015 for IA #15-090**

*At 4:08 p.m., Ms. Bruno moved, Ms. Soberalski seconded, and the Board voted 3-0 to go into closed session to deliberate the Carol Laska and Nolan Gaiovnik matters. At 4:23 p.m., the Board reconvened in open session.*

Ms. Bruno moved, Ms. Soberalski seconded, and the Board, by unanimous vote (3-0), found that the evidence was sufficient to sustain violations of Civil Service Rule VII, Section 4(1), paragraphs (k), (l), and (u), and upheld the 60-day suspension of Mr. Gaiovnik.

Ms. Bruno moved, Ms. Soberalski seconded, and the Board, by unanimous vote (3-0), found that the evidence was sufficient to sustain violations of Civil Service Rule VII, Section 4(1), paragraphs (b), (l), (w), and (dd), and upheld the discharge of Mr. Gaiovnik.

### **C. SUSPENSION**

#### **QUIVON DILLON, Correction Officer I, SHERIFF**

**Case #1-4193, dated 02/26/2015 for IA #14-298 for 25 days**

**Case #1-4202, dated 04/02/2015 for IA #15-017 for 30 days**

**Case #1-4218, dated 05/19/2015 for IA #15-087 for 10 days**

**Case #1-4219, dated 05/19/2015 for IA #15-088 for 15 days**

The Board heard the report of David Eisner, Staff Representative, AFSCME, District Council 32, that Quivon Dillon was waiving a right to his hearing for Case Number 1-4202 and accepting the 30-day suspension. Mr. Eisner also reported that the suspensions charged in Case Numbers 1-4218 and 1-4219 had been combined and reduced to 20 days total and that Mr. Dillon waived his right to a hearing on those matters and accepted the now 20-day suspension.

The Board expected to go forward with the hearing for Case Number 1-4193; however, there was not enough time on July 7, 2015, for the Board to conduct Mr. Dillon's hearing after addressing other matters. Ms. Bruno moved, Ms. Soberalski seconded, and the Board, by unanimous vote (3-0), rescheduled Case Number 1-4193 for hearing certain on August 18, 2015.

### **VIII. Adjournment**

Ms. Bruno moved, Ms. Soberalski seconded, and the Board, by unanimous vote (3-0), adjourned the meeting at 4:24 p.m.

Minutes submitted by: Rebecca M. Janz, PRB/Ethics Board Administrator

**Milwaukee County Personnel Review Board**  
**Meeting Minutes – July 21, 2015**

**I. Roll Call**

Board President Daniel Dennehy called to order the regular meeting of the Personnel Review Board at 9:05 a.m. on Tuesday, July 21, 2015, in Room 203-R of the Milwaukee County Courthouse.

The following Board Members were present: Mr. Dennehy, Ms. Susan A. Lueger, Ms. Mary K. Bruno, and Mr. Carlos Pastrana. Ms. Melissa Soberalski was excused.

**II. Approval of the Minutes of the July 7, 2015 Meeting**

Ms. Bruno moved, Mr. Pastrana seconded, and the Board, by unanimous vote (4-0), approved the minutes of the July 7, 2015 meeting.

**III. Communications and/or comments from the public, if any**

None.

**IV. Correspondence**

The Board heard the report of Rebecca M. Janz, Administrator, that the Board received an anonymous letter regarding an employee of the Milwaukee County Sheriff's Office. The letter did not include any affidavits or request any specific remedy, and was thus not a proper citizens' complaint to the Board. (*See* Wis. Stat. 63.10(1)). The Board received the letter and placed it on file.

**V. First Appearances**

**A. DISCHARGES**

**DEIDRE DANLEY, Correction Officer I, HOC**

**Case #2-4233, dated 07/09/2015 for HOC IA #15-053**

The Board heard the report of Paul Kuglitsch, Assistant Corporation Counsel, that Deirdre Danley, who was not present, had resigned from her position with the County. Rebecca M. Janz, Administrator, confirmed the Board received Ms. Danley's resignation. The Board recognized the resignation and closed the case.

**ALISA BUTLER, Juvenile Correction Officer, DHHS**

**Case #2-4232, dated 07/02/2015**

The Board heard the report of Attorney Paul Kuglitsch, Assistant Corporation Counsel, that the appointing authority was withdrawing the charges against Alisa Butler. David Eisner, Staff Representative, AFSCME District Council 32, stated that this arrangement was acceptable to Ms. Butler. The Board allowed the withdrawal and closed the case.

## VI. Hearings

### A. **SUSPENSIONS**

#### **TROY MOORE-SPICER, Correction Officer 1, SHERIFF**

##### **Case #1-4223 dated 05/20/2015 for IA #15-081**

The Board heard the report of Mr. David Eisner, Staff Representative, AFSCME District Council 32, that Troy Moore-Spicer had submitted a signed waiver of hearing on the Notice of Suspension. Rebecca M. Janz, Administrator, confirmed the Board received the waiver. Ms. Lueger moved, Mr. Pastrana seconded, and the Board, by unanimous vote (4-0), accepted Mr. Moore-Spicer's waiver and closed the case.

#### **VICTORIA MIKULA, Deputy Sheriff I, SHERIFF**

##### **Case #1-4220, dated 05/20/2015 for IA #15-026**

The Board heard the report of Ryan MacGillis, MacGillis Weimer, on behalf of Victoria Mikula, who was present, that one of Ms. Mikula's witnesses could not appear today and that Mr. MacGillis could not come before the Board again until September 1, 2015. Ms. Bruno moved, Ms. Lueger seconded, and Board, by unanimous vote (4-0), decided to move forward with as much of the hearing as possible today and to hear the remaining witnesses on September 1, 2015.

#### **JAMIE SEIDL, Correction Officer I, SHERIFF**

##### **Case #1-4222, dated 05/20/2015 for HOC IA #15-029**

*At 4:19 p.m., Ms. Bruno moved, Ms. Lueger seconded, and the Board voted 4-0 to go into closed session to deliberate the Jamie Seidl matter. At 4:32 p.m., the Board reconvened in open session.*

Ms. Bruno moved, Ms. Lueger seconded, and the Board, by unanimous vote (4-0), found that the evidence was sufficient to sustain violations of Civil Service Rule VII, Section 4(1), paragraphs (1) and (o), but, due to concerns regarding Milwaukee County's intermittent Family Medical Leave Act leave procedures, the Board reduced the proposed 20-day suspension to a 15-day suspension.

## VII. Adjournment

Ms. Lueger moved, Ms. Bruno seconded, and the Board, by unanimous vote (4-0), adjourned the meeting at 4:33 p.m.

Minutes submitted by: Rebecca M. Janz, PRB/Ethics Board Administrator

## COUNTY OF MILWAUKEE

### INTER-OFFICE MEMORANDUM

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**DATE:** July 28, 2015

**TO:** Rick Ceschin, Deputy Director  
Department of Human Resources

**FROM:** John Barrett   
Clerk of Circuit Court

**SUBJECT:** Request to Transfer Position from Classified to Unclassified Service

#### Request

Combined Court Operations, Office of Clerk of Circuit Court, Org Unit 2811, requests that the position of Senior Financial Manager, position #00076172000002, be transferred from the classified service to the unclassified service.

#### Background

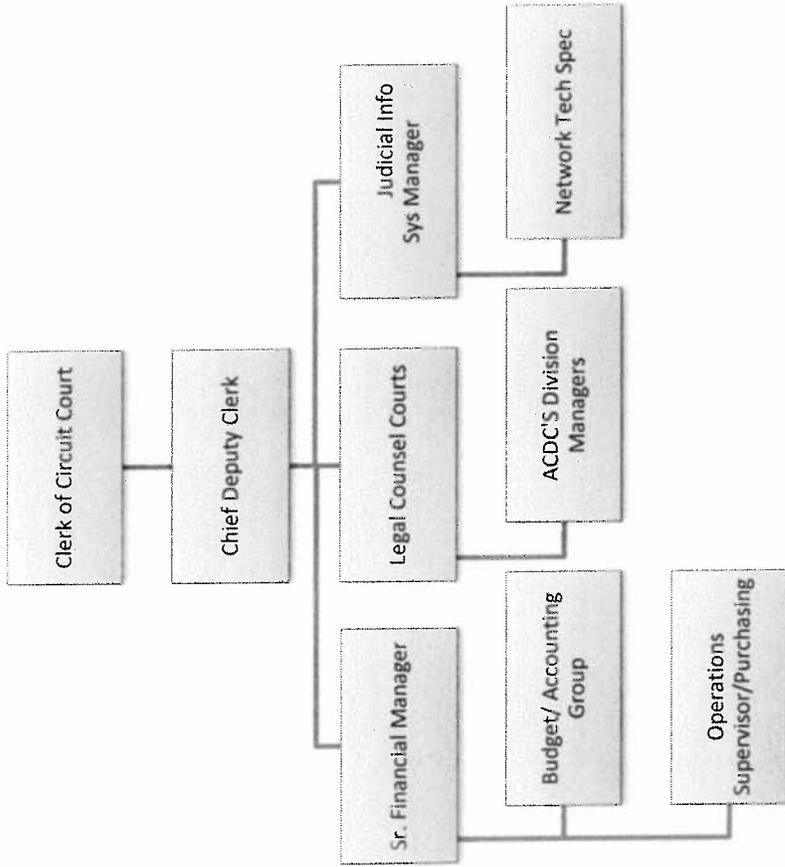
The Senior Financial Manager is responsible for:

- The efficient operation of court administered fiscal policies and the division's operations, including short and long term strategic planning, and program funding.
- Ensuring compliance with all applicable ordinances, governmental accounting principles, and County financial requirements.
- Preparation of the annual requested tax levy for both Combined Court Operations and Pre-Trial Services, balancing the need for services against keeping property taxes low.
- Preparation of monthly fiscal projections for both Combined Courts Operations and Pre-Trial Services along with informing the respective department heads of problems and potential solutions.

This position reports to the Chief Deputy and the Clerk of Circuit Court and represents the Clerk of Circuit Court and/or the Chief Judge at meetings.

A review of the duties and responsibilities for the position identified above indicates that the position qualifies for inclusion in the unclassified service as specified in Wisconsin State Statutes 63.03 (3) (a). I have attached a copy of the position description for the position in addition to the organizational chart for your reference.

Thank you for your consideration of this request. I will be available to answer any questions you may have.



Administration (Courts)

Approved: John Barrett  
John Barrett  
Clerk of Circuit Court

Dated: 7/28/15



## MILWAUKEE COUNTY JOB DESCRIPTION

**Job Title: Senior Financial Manager**

**Department: Clerk of Circuit Court**

**FLSA Status:**

**Pay Range: \$40.4304-\$48.9237**

**Revision Date 12/05/2014**

**Job Summary:** This position is responsible for all financial functions within the Combined Courts

### **Essential Duties and Responsibilities:**

- Creation of the department's annual budget request. This requires a balancing act with maintaining statutorily defined services, improvements desired within the department, County Executive guidelines, and providing taxpayers with a stable tax levy.
- Provide monthly fiscal projections for both Combined Courts & Pre-Trial Services to DAS. Perform trend analysis and report unusual activity. Analyze projections against amended budget to determine if budget deficit possible. Provide guidance on how to minimize/eliminate.
- Prepare or assist in the preparation of reports, presentations, and responses to County Executive's office, County Board of Supervisors, Department of Administration, Wisconsin Supreme Court, external financial auditors, and/or public requests.
- Provide administrative, technical and fiscal support to all divisions of the Combined Courts Related Operations (200) and Department of Pre-Trial Services (290)
- Administer fiscal policies and programs for the First Judicial District for the State of Wisconsin. Oversee Chief Judge and Clerk of Circuit Court directives for Combined Courts Operations related to initiatives for fiscal and budget areas. Internal auditing is required.
- Provide both short and long term fiscal planning for both Combined Courts Operations and Department of Pre-Trial Services in coordination with Chief Judge and Clerk of Circuit Court.
- Initiate, develop, communicate, implement, and monitor policies and procedures that improve the overall accuracy and efficiency of the department's administrative and fiscal management.
- Provide analytical review of the general ledger to ensure proper accounting for all transactions. Ensure that Generally Accepted Accounting Practices (GAAP) and Milwaukee County accounting practices are followed.
- Represent the Clerk of Circuit Court and/or Chief Judge at meetings as assigned. Act as liaison between local municipalities, state agencies, and federal agencies.

### **Minimum Education & Years of Experience Required:**

Bachelor's Degree in Accounting. CPA or MBA preferred. Five or more years of experience in Accounting, Governmental Accounting experience preferred.

**License/Certification:** CPA license preferred

### **Required Skills and Abilities:**

- Exchange of basic information with internal and/or external contacts.
- Contact with employees or others primarily at a routine level involving basic information exchange.

- Contact with peers and others involving explanation of information (these contacts may be within or outside department or division), and the gathering of factual information. May include the communication of sensitive or confidential information.
- Contact across departments or divisions with employees involving persuasion of others, absent formal authority, to conform to a policy interpretation or recommended course of action.
- Contact that requires a high degree of authority in securing understanding and cooperation of multiple departments or interests.
- Frequent external contact to: gather information, answer queries, or ask assistance.
- External contact involving a requirement to maintain a continuing external working relationship with individuals or organizations.
- External contact involving the initiation and maintenance of relationships that can have a significant effect on the success of the organization.
- Read, write and comprehend simple instructions, reports, short correspondence and memos.
- Read, analyze, and interpret safety rules, operating/maintenance instructions and procedure manuals
- Write routine reports, correspondence, and speak effectively before both internal and external groups.
- Read, analyze, and interpret business manuals, technical procedures and/or government regulations
- Read, analyze, and interpret scientific and technical journals, financial reports and legal documents
- Prepare and/or present written communications that pertain to controversial and complex topics.
- Major responsibility for decisions and final recommendation, which may result in the formulation of strategic plans of action to achieve the broad objectives for the organization.
- Work of a relatively routine nature. Requires the ability to understand and follow instructions.
- Structured work, following a limited variety of standard practices.
- Generally structured work, but involving a choice of action within limits of standard policy and procedures.
- Generally diversified and moderately difficult work. Requires judgment in the adaptation and interpretation of established practices and procedures to meet problems and situation which the application is not clearly defined.
- Typically difficult or complex work. Generally governed by broad instructions and objectives usually involving frequently changing conditions and problems.
- Work requires the ability to plan and perform work in light of new or constantly changing problems, work from broad instruction, and deal with complex factors not easily evaluated. Decisions require considerable judgment, initiative, and ingenuity in areas there is little precedent.
- Work requires the ability to act independently in the formulation and administration of policies and programs for major departments or functions.

**Supervisory/Managerial Responsibility:** Scheduling, supervision and evaluation of work; recommends personnel actions (hiring, termination and/or pay changes); administers through subordinate management, departmental programs or operations.

**Physical Demands:** Standing, Walking/Running, Sitting, Reaching, Bending/Kneeling, Driving, Manual Dexterity, Hearing, Talking, Visual, Typing, Writing, Lifting/Carrying 25 lbs. Pushing/Pulling 25 lbs.

**Non-Physical Demands:** Analysis/Reasoning, Communication/Interpretation, Math/Mental Computation, Reading, Sustained Mental Activity (i.e., auditing, problem solving, grant writing and composing reports, etc.).

**Environmental Demands:** Working Independently, Task Changes, Tedious/Exacting Work, Dust, and High Volume of Public Contact.

**Work Schedule:** Routine shifts hours. Infrequent overtime, weekend, or shift rotation.

**Demands/Deadlines:** High volume and variable work demands and deadlines that impose strain on a routine basis; frequent direct contact with individuals or exposure to highly stressful situation, demands or pressures.

DRAFT



## MILWAUKEE COUNTY JOB EVALUATION QUESTIONNAIRE

This form is designed to assist you in describing your departmental job. You are asked to fill this form out to outline the essential duties and responsibilities; and identify the knowledge, skills and abilities required to successfully perform the job. This form is used to request new job classifications, review current classifications, reclassification, reallocations, and general updates to the job description. **Note:** It is the job that is being evaluated, not the position/incumbent. Thank you for your cooperation.

**GENERAL INSTRUCTIONS:**

1. Before beginning, please look over the entire questionnaire. Each question should be answered completely and accurately. If a question does not apply to this job, please indicate "N/A" (Not Applicable).
2. To complete the questionnaire, please type and/or select your responses.
3. If you wish to make additional comments, please use the space available in the "Additional Comments" section on page 6 of this questionnaire.

**A. JOB IDENTIFICATION INFORMATION:**

<b>Department (High Org):</b>	200	<b>Division (Low Org):</b>	2811
<b>Contact for this Study</b>	Name: James Smith	Email: JAMES.SMITH@WICOURTS.GOV	
	Title: Chief Deputy Clerk of Court	Phone: 414-278-5044	
<b>Current Job Title:</b>	Fiscal Operations Administrator - Courts		
<b>Job Reports To:</b>	Title: Clerk of Circuit Court		
<b>Request Type:</b>	<input type="checkbox"/> Establish New <input checked="" type="checkbox"/> Review <input type="checkbox"/> Reclassification <input type="checkbox"/> Reallocation <input type="checkbox"/> Update Description <input checked="" type="checkbox"/> Other, Specify Milw County 2013 job analysis & evaluation project		

**B. JUSTIFICATION STATEMENT:**

<b>1. Attach an organizational chart.</b>	
<b>2. Explain the events or changes that made this request necessary.</b>	
This is part of the Milwaukee County 2013 job analysis and evaluation project	

**C. ABOUT THE JOB:**

<b>Job Status:</b>	<input checked="" type="checkbox"/> Regular Full-Time	<input type="checkbox"/> Regular Part-Time	<input type="checkbox"/> Seasonal	<input type="checkbox"/> Contract
<b>Shift:</b>	<input checked="" type="checkbox"/> Day	<input type="checkbox"/> Evening	<input type="checkbox"/> Night	<input type="checkbox"/> Other:
<b>Hours Per Week:</b>	<input checked="" type="checkbox"/> >40 Hours	<input type="checkbox"/> 32-40 Hours	<input type="checkbox"/> 20-32 Hours	<input type="checkbox"/> <20 Hours
<b>Travel:</b>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No    If Yes, % Travel <5%			
<b>Will This Job Supervise/Manage?</b>	<input type="checkbox"/> Supervise <input checked="" type="checkbox"/> Manage		<input type="checkbox"/> N/A	# of Direct Reports: 9

**D. JOB SUMMARY:**

Briefly state, in several sentences, the principle purpose or function of the job. Respond by describing <b>What</b> the job is, <b>What</b> its major objective is, and <b>Why</b> does it exist.	
This position is responsible for all financial functions within the Combined Courts.	

**E. ESSENTIAL DUTIES/RESPONSIBILITIES:**

Item 4.0

**JOB RESPONSIBILITY LIST:** Please describe the major elements of the job. List only the major functions, separately, in order of importance. Provide a one or two line descriptive statement for each duty so that it can be understood by someone not familiar with this kind of work. Weight the approximate percentage of allocated work time for each functional work activity (Round to the nearest 5%). We do not need to know HOW the function is to be performed, but rather, WHAT it is to be performed. **Percentages should add up to 100%**

1.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Annual budget preparation	% of Time: 20
	<i>Descriptive:</i> Creation of the department's annual budget request. This requires a balancing act with maintaining statutorily defined services, improvements desired within the department, County Executive guidelines, and providing taxpayers with a stable tax levy.		
2.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Current year fiscal projections	% of Time: 20
	<i>Descriptive:</i> Provide monthly fiscal projections for both Combined Courts & Pre-Trial Services to DAS. Perform trend analysis and report unusual activity. Analyze projections against amended budget to determine if budget deficit possible. Provide guidance on how to minimize/eliminate.		
3.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Report to partner requests	% of Time: 10
	<i>Descriptive:</i> Prepare or assist in the preparation of reports, presentations, and responses to County Executive's office, County Board of Supervisors, Department of Administration, Wisconsin Supreme Court, external financial auditors, and/or public requests.		
4.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Fiscal support	% of Time: 10
	<i>Descriptive:</i> Provide administrative, technical, and fiscal support to all divisions of the Combined Courts Related Operations (200) and Department of Pre-Trial Services (290)		
5.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Administer fiscal policies	% of Time: 10
	<i>Descriptive:</i> Administer fiscal policies and programs for the First Judicial District for the State of Wisconsin. Oversee Chief Judge and Clerk of Circuit Court directives for Combined Courts Operations related to initiatives for fiscal and budget areas. Internal auditing as required.		
6.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Planning	% of Time: 10
	<i>Descriptive:</i> Provide both short and long term fiscal planning for both Combined Courts Operations and Department of Pre-Trial Services in coordination with Chief Judge and Clerk of Circuit Court.		
7.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Departmental policies and procedures	% of Time: 10
	<i>Descriptive:</i> Initiate, develop, communicate, implement, and monitor policies and procedures that improve the overall accuracy and efficiency of the department's administrative and fiscal management.		
8.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: General ledger maintenance	% of Time: 5
	<i>Descriptive:</i> Provide analytic review of the general ledger to ensure proper accounting for all transactions. Ensure that Generally Accepted Accounting Practices (GAAP) and Milwaukee County accounting practices are followed.		
9.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Representation	% of Time: 5
	<i>Descriptive:</i> Represent the Clerk of Circuit Court and/or Chief Judge at meetings as assigned. Act as liaison between local municipalities, state agencies, and federal agencies.		
10.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		

**F. EQUIPMENT, TOOLS & MATERIALS**

Item 4.0

Please list all equipment, tools or materials required to perform the job along with the frequency.	Frequency			Type of Equipment
	Daily	Weekly	Monthly	
1. Machinery: (i.e. Vehicles, Motorized Equipment, Heavy Machinery, etc)			Vehicle	Use of auto when traveling to various training conferences (quarterly)
2. Hand Tools/Instruments: (i.e. Power Tools, PC's, office or laboratory equipment, weapons, etc.)	X			Computer, copier, fax machine
3. Driving required?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			

**G. JOB COMPETENCIES**

**Internal Contacts:** Please select all that apply.

- Contact with employees or others primarily at a routine level involving basic information exchange.
- Contact with peers and others involving explanation of information (these contacts may be within or outside department or division), and the gathering of factual information. May include the communication of sensitive or confidential information.
- Contact across departments or divisions with employees involving persuasion of others, absent formal authority, to conform to a policy interpretation or recommended course of action.
- Contact that requires a high degree of authority in securing understanding and cooperation of multiple departments or interests.

**External Contacts:** Please select all that apply.

- No contact with people outside the organization.
- Limited external contact to: gather information, answer queries, or ask assistance.
- Frequent external contact to: gather information, answer queries, or ask assistance.
- External contact involving a requirement to maintain a continuing external working relationship with individuals, or organizations.
- External contact involving the initiation and maintenance of relationships that can have a significant effect on the success of the organization.

**Communication Skills:** Select the level of language (ability to read, write and speak needed to successfully accomplish the essential duties of the job.) Please select all that apply.

- Read, write and comprehend simple instructions, short correspondence and memos.
- Read and interpret safety rules, operating/maintenance instructions and procedure manuals.
- Write routine reports, correspondence, and speak effectively before both internal and external groups.
- Read, analyze, and interpret business manuals, technical procedures and/or government regulations.
- Read, analyze, and interpret scientific and technical journals, financial reports and legal documents.
- Prepare and/or present written communications that pertain to controversial and complex topics.

**Decision-Making:** Please select only one of the following:

- Requires minimal decision-making responsibility.
- Regularly makes decisions involving how a project or operation will be conducted (i.e. sequence or method), and generally from an available set of alternatives or precedents.
- Regularly makes decisions of responsibility, involving evaluation of information. Decisions may require development or application of alternatives or precedents.
- Regularly makes significant decisions and final results, typically affecting the entire department. Available guides or precedents are limited. Has authority over the allocation of resources.
- Significant responsibility for decisions and final results, affecting more than one department or a department with multiple units. Substantial analysis is required and many factors must be weighed before a decision can be reached.
- Major responsibility for decisions and final recommendation, which may result in the formulation of strategic plans of action to achieve the broad objectives for the organization.
- Primary work responsibility involves the long-range future including the scope, direction and goals of the organization.

<b>Complexity, Judgment and Problem Solving:</b> Please select all that apply. <span style="float: right;">Item 4.0</span>	
<input checked="" type="checkbox"/>	Work of a relatively routine nature. Requires the ability to understand and follow instructions.
<input checked="" type="checkbox"/>	Structured work, following a limited variety of standard practices.
<input checked="" type="checkbox"/>	Generally structured work, but involving a choice of action within limits of standard policy and procedures.
<input checked="" type="checkbox"/>	Generally diversified and moderately difficult work. Requires judgment in the adaptation and interpretation of established practices and procedures to meet problems and situations to which the application is not clearly defined.
<input checked="" type="checkbox"/>	Typically difficult or complex work. Generally governed by broad instructions and objectives usually involving frequently changing conditions and problems.
<input checked="" type="checkbox"/>	Work requires the ability to plan and perform work in light of new or constantly changing problems, work from broad instruction, and deal with complex factors not easily evaluated. Decisions require considerable judgment, initiative, and ingenuity in areas there is little precedent.
<input checked="" type="checkbox"/>	Work requires the ability to act independently in the formulation and administration of policies and programs for major departments or functions.

<b>Supervisory/Managerial:</b> If applicable, select the appropriate level of responsibility.	
<input checked="" type="checkbox"/>	<b>Level 1</b> General instructing, scheduling, and reviewing the work of others performing the same or directly related work. Acts as "lead worker". Functional supervision only.
<input checked="" type="checkbox"/>	<b>Level 2</b> Recommends personnel actions (hiring, termination, pay changes). Involves scheduling, supervision, and evaluation of work of employees who perform similar work assignments.
<input checked="" type="checkbox"/>	<b>Level 3</b> Scheduling, supervision, and evaluation of work as a "manager" of the first line supervisors; or perform supervision of workers who perform distinct and separate blocks of work.
<input checked="" type="checkbox"/>	<b>Level 4</b> Scheduling, supervision, and evaluation of work as a superior of "managers". Administers through subordinate managers, departmental multi-function programs or operations.
<input checked="" type="checkbox"/>	<b>Level 5</b> Scheduling, supervision, and evaluation of work as a superior of those in level 4.
<b>List the names of the Department(s)/Division(s) supervised/managed by this job:</b>	
<ul style="list-style-type: none"> <li>Fiscal Operations - Administration</li> </ul>	
Are there subordinate supervisors/managers reporting to this job? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If yes, how many? 9	

<b>Fiscal Responsibility:</b>	
Responsible for annual operating budget for department(s)/division(s)?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide total amount? \$33.9 MILL

**- Go To Next Page -**

H. WORKING CONDITIONS

Item 4.0

What are the physical, mental and environment demands for this job? Functions identified must coincide with the descriptive statement of essential duties and responsibilities for this job. The functions should focus on what is to be done and the processes traditionally used to achieve end results. For each of the following functional requirements, indicate the frequency in which it occurs in this job.

<u>PHYSICAL DEMANDS</u>		N/A	Seldom (<25%)	Occasional (25% - 50%)	Frequent (50% - 75%)	Always (>75%)
Standing		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walking/Running		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sitting		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reaching		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bending/Kneeling		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hearing		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Talking		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Visual		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Typing		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Fine Dexterity		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manual Dexterity		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upper Extremity Repetitive Motion		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting/Carrying	25 lbs.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pushing/Pulling	25 lbs.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>NON-PHYSICAL DEMANDS</u>		N/A	Seldom (<25%)	Occasional (25% - 50%)	Frequent (50% - 75%)	Always (>75%)
Analysis/Reasoning		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Communication/Interpretation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Math/Mental Computation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reading		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sustained Mental Activity (i.e. auditing, problem solving, grant writing, composing reports)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Writing		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other:		<input type="checkbox"/>				
<u>ENVIRONMENTAL DEMANDS</u>		N/A	Seldom (<25%)	Occasional (25% - 50%)	Frequent (50% - 75%)	Always (>75%)
Work Alone		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Frequent Task Changes		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tedious/Exacting Work		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High Volume Public Contact		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dust		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Temperature Extremes		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loud Noises		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Danger		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toxic Substances (i.e. solvents, pesticides, etc.)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:		<input type="checkbox"/>				

**WORK SCHEDULE:** Please select all that apply.

- Routine shift hours. Infrequent overtime, weekend, or shift rotation.
- Considerable irregularity of hours due to frequent overtime, weekend or shift rotation.
- Regular and/or frequent on-call availability.
- Nature of work frequently requires irregular, unpredictable or particularly long hours. (I.e. covering double shifts, etc.)

**DEMANDS/DEADLINES:** Please select all that apply.

<input type="checkbox"/>	Little or no stress created by work, employees, or public.
<input type="checkbox"/>	Occasional stress due to deadlines or workload because of intermittent or cyclical work pressures, or occasional exposure to distressed individuals within the immediate work environment.
<input checked="" type="checkbox"/>	High volume and variable work demands and deadlines impose strain on routine basis or considerable stress intermittently; OR regular direct contacts with distressed individuals within the immediate work environment; and/or exposure to demands and pressures from persons other than immediate supervisor.
<input type="checkbox"/>	Work requires frequent, substantive contacts with people in highly stressful situations; delicacy and unpredictability of contacts routinely creates considerable strain or heavy stress regularly.

**I. EDUCATION, EXPERIENCE AND LICENSE**

**EDUCATION**  
Please indicate the MINIMUM educational level required:

<input type="checkbox"/>	HS Diploma/GED	Area of specialization/major:
<input type="checkbox"/>	Associate's Degree	Area of specialization/major:
<input checked="" type="checkbox"/>	Bachelor's Degree	Area of specialization/major: Accounting
<input type="checkbox"/>	Graduate Degree	Area of specialization/major:
<input type="checkbox"/>	Post Graduate Degree (PhD)	Area of specialization/major:
<input type="checkbox"/>	Professional Degree (Law, Medicine, etc.)	Area of specialization/major:
<input checked="" type="checkbox"/>	Other:	Please indicate: CPA or MBA preferred

**WORK EXPERIENCE**  
Please indicate the MINIMUM number of years of practical experience required.

<input type="checkbox"/>	No experience	
<input type="checkbox"/>	Less than one year	Area(s) of experience:
<input type="checkbox"/>	One to three years	Area(s) of experience:
<input type="checkbox"/>	Three to five years	Area(s) of experience:
<input checked="" type="checkbox"/>	Five or more years	Area(s) of experience: Governmental accounting experience preferred

**SUPERVISORY/MANAGEMENT EXPERIENCE**  
Please indicate the MINIMUM number of years of supervisory/management experience required.

<input type="checkbox"/>	No experience	
<input type="checkbox"/>	Less than one year	Area(s) of experience:
<input type="checkbox"/>	One to three years	Area(s) of experience:
<input type="checkbox"/>	Three to five years	Area(s) of experience:
<input checked="" type="checkbox"/>	Five or more years	Area(s) of experience: 7 yrs exp in Public Admin with policy and/or budget developm

**LICENSE/CERTIFICATION:**  
What license(s), certification/certificate(s), registration(s), or other regulatory requirements/training:  
CPA license preferred.

**J. ADDITIONAL COMMENTS**

Please list additional items not covered in this questionnaire that you feel would be helpful in understanding the job.

-

K. SIGNATURES:

Item 4.0

<b>SUPERVISOR'S/MANAGER'S CONFIRMATION:</b> I have completed and/or reviewed the contents of this job evaluation questionnaire and consent to its accuracy.	
Supervisor/Manager Signature:	Date:
Department/Division Head Signature: <i>John Barrett</i>	Date: 05/7/13

Email the completed form to: [HRCompensation@milwcnty.com](mailto:HRCompensation@milwcnty.com). Please ensure the subject line includes the request type and Department (High Org.) number. (I.e. 2013 STUDY 1140)

Received by Human Resources - Compensation Department  
Analyzed by Human Resources - Compensation Department

Initials:  
Initials:

Date:  
Date:

To: Milwaukee County Civil Service Commission  
From: Marian Ninneman, Director, Retirement Services

Date: August 7, 2015

Subject: Request to Transfer a Position from Classified Service to Unclassified Service – Manager, Retirement Services

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### **Request**

The Department of Human Resources – Retirement Services Division requests that the position of Manager, Retirement Services be transferred to an unclassified service position.

### **Background**

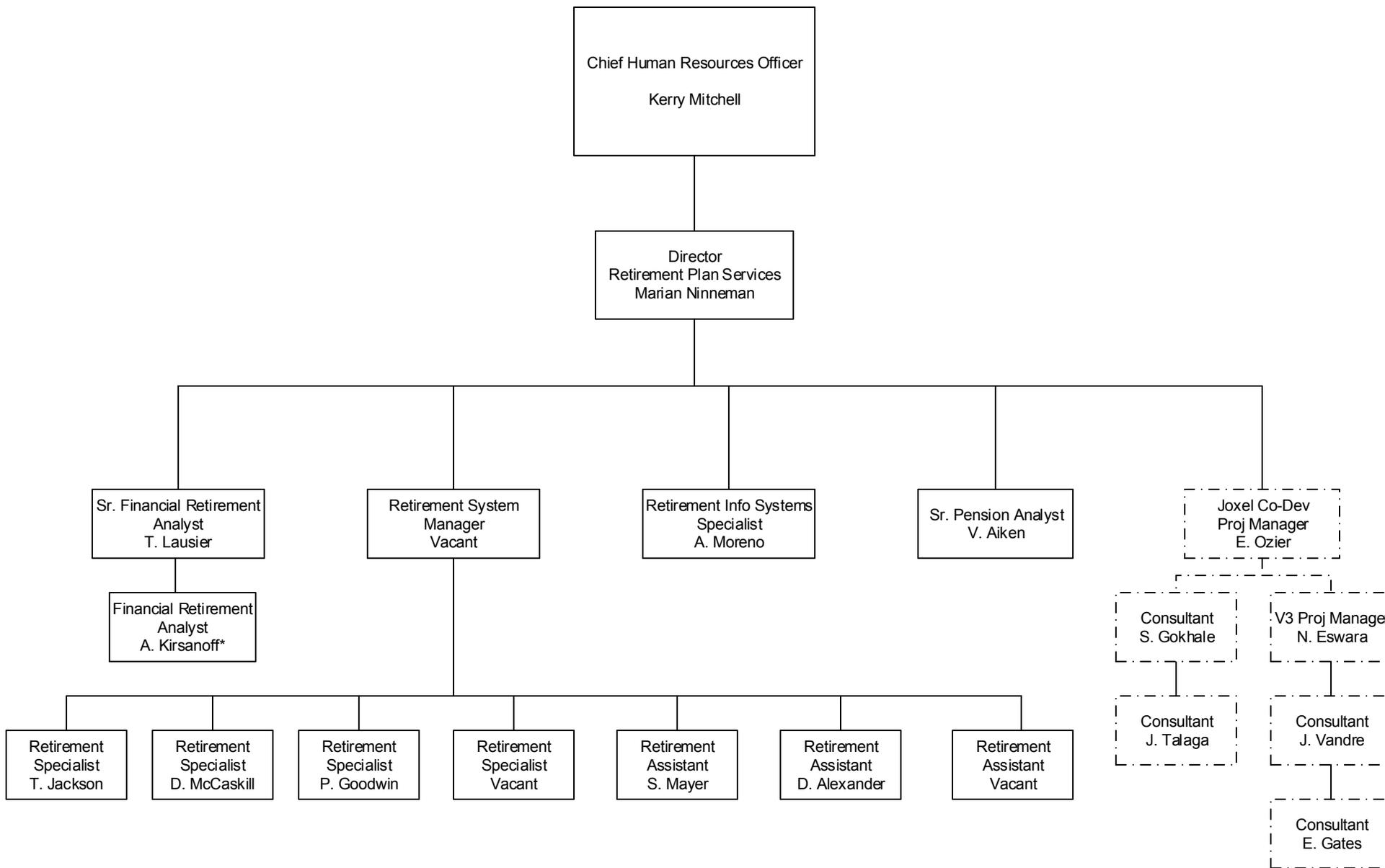
Retirement Services provides retirement information to active employees and transitions those employees to retirement. We process monthly pension disbursements for approximately 8,300 members, retiring an average of 300 new members each year, and conducting individual retirement information sessions with close to 200 active members annually. Retirement Plan Services has administrative oversight of the \$1.7 Billion pension fund and is responsible for an operating budget of \$12 Million. We currently work with 21 investment managers who have invested fund monies in various asset classes. Retirement Services works with a 10-person pension board ensuring compliance with State statutes, County Ordinances and Board rules and proposing ordinance amendments and Board rules when issues arise.

The Manager of Retirement Services is responsible for providing direction and leadership to a team of seven employees, including four Retirement Specialists and three Clerical Specialists. This includes establishing goals and objectives, evaluating and managing performance, ensuring work assignments are completed timely and accurately, ensuring total compliance and reducing risk with our very complex pension system, and professional development of the staff. The individual in this position is also responsible for executing all aspects of day-to-day department operations.

This vacant position reports to the Director of Retirement Services who reports to the Chief Human Resource Officer (CHRO). The CHRO reports to the County Executive. Previously, this position was titled “ERS Coordinator,” which made it difficult to find an interested, qualified management applicant. The position was recently retitled and recruited for through the Civil Service process resulting in only four candidates meeting the minimum requirements of the position and two candidates invited for a second interview. The desired candidate was offered the position and declined. It has become increasingly difficult to find a qualified candidate through the current recruiting process. This management position (32M) needs to be transferred to the unclassified service prior to making an appointment.

A review of the duties, responsibilities and pay grade (greater than 30M) for the position identified above indicates that the position appears to qualify for inclusion in the unclassified service as specified in Wisconsin State Statutes 63.03(3)(a). I have attached a copy of the Job Evaluation Questionnaire for the position as well as a department organization chart for your reference.

Thank you for your consideration of this request. I am available to answer any questions.



\*Starting 8/17/15. Currently filled by Account Temp worker Mary Bryant & will continue until transition complete.



### MILWAUKEE COUNTY JOB EVALUATION QUESTIONNAIRE

This form is designed to assist you in describing your departmental job. You are asked to fill this form out to outline the essential duties and responsibilities; and identify the knowledge, skills and abilities required to successfully perform the job. This form is used to request new job classifications, review current classifications, reclassification, reallocations, and general updates to the job description. **Note:** It is the job that is being evaluated, not the position/incumbent. Thank you for your cooperation.

**GENERAL INSTRUCTIONS:**

1. Before beginning, please look over the entire questionnaire. Each question should be answered completely and accurately. If a question does not apply to this job, please indicate "N/A" (Not Applicable).
2. To complete the questionnaire, please type and/or select your responses.
3. If you wish to make additional comments, please use the space available in the "Additional Comments" section on page 6 of this questionnaire.

**A. JOB IDENTIFICATION INFORMATION:**

<b>Department (High Org):</b>	1140	<b>Division (Low Org):</b>	1149
<b>Contact for this Study</b>	Name: Marian Ninneman	Email: MNINNEMAN@MILWCNTY.COM	
	Title: Director Retirement Plan Servi	Phone: 414.278.4966	
<b>Current Job Title:</b>	Retirement Services Manager		
<b>Job Reports To:</b>	Title: Director Retirement Plan Services		
<b>Request Type:</b>	<input type="checkbox"/> Establish New <input type="checkbox"/> Review <input type="checkbox"/> Reclassification <input type="checkbox"/> Reallocation <input checked="" type="checkbox"/> Update Description <input type="checkbox"/> Other, Specify		

**B. JUSTIFICATION STATEMENT:**

<b>1. Attach an organizational chart.</b>
<b>2. Explain the events or changes that made this request necessary.</b>
Department - Comp Study. Department suggests Retirement Services Manager title.

**C. ABOUT THE JOB:**

<b>Job Status:</b>	<input checked="" type="checkbox"/> Regular Full-Time	<input type="checkbox"/> Regular Part-Time	<input type="checkbox"/> Seasonal	<input type="checkbox"/> Contract
<b>Shift:</b>	<input checked="" type="checkbox"/> Day	<input type="checkbox"/> Evening	<input type="checkbox"/> Night	<input type="checkbox"/> Other:
<b>Hours Per Week:</b>	<input type="checkbox"/> >40 Hours	<input checked="" type="checkbox"/> 32-40 Hours	<input type="checkbox"/> 20-32 Hours	<input type="checkbox"/> <20 Hours
<b>Travel:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No    If Yes, % Travel 10%			
<b>Will This Job Supervise/Manage?</b>	<input type="checkbox"/> Supervise <input checked="" type="checkbox"/> Manage		<input type="checkbox"/> N/A	# of Direct Reports: 7

**D. JOB SUMMARY:**

Briefly state, in several sentences, the principle purpose or function of the job. Respond by describing <b>What</b> the job is, <b>What</b> is its major objective, and <b>Why</b> does it exist.
Assists Retirement Plan Services Director in providing operational administration and staff management for multiple defined benefit pension plans. Under the general direction of the Director, leads the customer Support, pension payment, and records processing functions with primary oversight of related staff. Assists Director with pension-related compliance / legal issues, and media inquiries.

E. ESSENTIAL DUTIES/RESPONSIBILITIES:

Item 5.0

**JOB RESPONSIBILITY LIST:** Please describe the major elements of the job. List only the major functions, separately, in order of importance. Provide a one or two line description for each duty so that it can be understood by someone not familiar with this kind of work. Weight the approximate percentage of allocated work time for each functional work activity (Round to the nearest 5%). We do not need to know HOW the function is to be performed, but rather, WHAT it is to be performed. **Percentages should add up to 100%**

1.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Staff Supervision	% of Time: 35
	<i>Descriptive:</i> Directs ERS staff including supervision, work assignments, performance evaluation and management and professional development. Assigns resources as needed to execute all aspects of ERS day to day operations.		
2.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Day to Day Pension Operations Management	% of Time: 35
	<i>Descriptive:</i> Oversight of the day-to-day operations, including but not limited to , quality assurance,benefit issuance, calculations, payments, service delivery and problem resolution		
3.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Process Improvement	% of Time: 10
	<i>Descriptive:</i> Develop and utilize metrics to monitor performance of staff and system, and identify opportunities for enhanced efficiencies.		
4.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Analysis and interpretation	% of Time: 10
	<i>Descriptive:</i> Analyze and interpret state statues, County ordinances, board rules, legal opinions, and precedents concerning ERS operations. Assist Director in the interpretation and application of the above as they relate to the ERS and OBRA pension plans.		
5.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Communication	% of Time: 10
	<i>Descriptive:</i> Member communications, correspondence and presentations at educational seminars.		
6.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		
7.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i> 0		
8.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		
9.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		
10.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		

**F. EQUIPMENT, TOOLS & MATERIALS**

Item 5.0

Please list all equipment, tools or materials required to perform the job along with the frequency.	Frequency			Type of Equipment
	Daily	Weekly	Monthly	
1. Machinery: (i.e. Vehicles, Motorized Equipment, Heavy Machinery, etc)				
2. Hand Tools/Instruments: (i.e. Power Tools, PC's, office or laboratory equipment, weapons, etc.)	x			General office Equipment
3. Driving required?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

**G. JOB COMPETENCIES**

**Internal Contacts:** Please select all that apply.

<input checked="" type="checkbox"/>	Contact with employees or others primarily at a routine level involving basic information exchange.
<input checked="" type="checkbox"/>	Contact with peers and others involving explanation of information (these contacts may be within or outside department or division), and the gathering of factual information. May include the communication of sensitive or confidential information.
<input type="checkbox"/>	Contact across departments or divisions with employees involving persuasion of others, absent formal authority, to conform to a policy interpretation or recommended course of action.
<input type="checkbox"/>	Contact that requires a high degree of authority in securing understanding and cooperation of multiple departments or interests.

**External Contacts:** Please select all that apply.

<input type="checkbox"/>	No contact with people outside the organization.
<input checked="" type="checkbox"/>	Limited external contact to: gather information, answer queries, or ask assistance.
<input checked="" type="checkbox"/>	Frequent external contact to: gather information, answer queries, or ask assistance.
<input checked="" type="checkbox"/>	External contact involving a requirement to maintain a continuing external working relationship with individuals, or organizations.
<input type="checkbox"/>	External contact involving the initiation and maintenance of relationships that can have a significant effect on the success of the organization.

**Communication Skills:** Select the level of language (ability to read, write and speak needed to successfully accomplish the essential duties of the job.) Please select all that apply.

<input checked="" type="checkbox"/>	Read, write and comprehend simple instructions, short correspondence and memos.
<input checked="" type="checkbox"/>	Read and interpret safety rules, operating/maintenance instructions and procedure manuals.
<input checked="" type="checkbox"/>	Write routine reports, correspondence, and speak effectively before both internal and external groups.
<input checked="" type="checkbox"/>	Read, analyze, and interpret business manuals, technical procedures and/or government regulations.
<input checked="" type="checkbox"/>	Read, analyze, and interpret scientific and technical journals, financial reports and legal documents.
<input checked="" type="checkbox"/>	Prepare and/or present written communications that pertain to controversial and complex topics.

**Decision-Making:** Please select only one of the following:

<input type="checkbox"/>	Requires minimal decision-making responsibility.
<input type="checkbox"/>	Regularly makes decisions involving how a project or operation will be conducted (i.e. sequence or method), and generally from an available set of alternatives or precedents.
<input checked="" type="checkbox"/>	Regularly makes decisions of responsibility, involving evaluation of information. Decisions may require development or application of alternatives or precedents.
<input type="checkbox"/>	Regularly makes significant decisions and final results, typically affecting the entire department. Available guides or precedents are limited. Has authority over the allocation of resources.
<input type="checkbox"/>	Significant responsibility for decisions and final results, affecting more than one department or a department with multiple units. Substantial analysis is required and many factors must be weighed before a decision can be reached.
<input type="checkbox"/>	Major responsibility for decisions and final recommendation, which may result in the formulation of strategic plans of action to achieve the

<input checked="" type="checkbox"/>	broad objectives for the organization.	
<input type="checkbox"/>	Primary work responsibility involves the long-range future including the scope, direction and goals of the organization.	Item 5.0

**Complexity, Judgment and Problem Solving:** Please select all that apply.

<input type="checkbox"/>	Work of a relatively routine nature. Requires the ability to understand and follow instructions.
<input type="checkbox"/>	Structured work, following a limited variety of standard practices.
<input checked="" type="checkbox"/>	Generally structured work, but involving a choice of action within limits of standard policy and procedures.
<input checked="" type="checkbox"/>	Generally diversified and moderately difficult work. Requires judgment in the adaptation and interpretation of established practices and procedures to meet problems and situations to which the application is not clearly defined.
<input checked="" type="checkbox"/>	Typically difficult or complex work. Generally governed by broad instructions and objectives usually involving frequently changing conditions and problems.
<input type="checkbox"/>	Work requires the ability to plan and perform work in light of new or constantly changing problems, work from broad instruction, and deal with complex factors not easily evaluated. Decisions require considerable judgment, initiative, and ingenuity in areas there is little precedent.
<input type="checkbox"/>	Work requires the ability to act independently in the formulation and administration of policies and programs for major departments or functions.

**Supervisory/Managerial:** If applicable, select the appropriate level of responsibility.

<input type="checkbox"/>	<b>Level 1</b> General instructing, scheduling, and reviewing the work of others performing the same or directly related work. Acts as "lead worker". Functional supervision only.
<input type="checkbox"/>	<b>Level 2</b> Recommends personnel actions (hiring, termination, pay changes). Involves scheduling, supervision, and evaluation of work of employees who perform similar work assignments.
<input checked="" type="checkbox"/>	<b>Level 3</b> Scheduling, supervision, and evaluation of work as a "manager" of the first line supervisors; or perform supervision of workers who perform distinct and separate blocks of work.
<input type="checkbox"/>	<b>Level 4</b> Scheduling, supervision, and evaluation of work as a superior of "managers". Administers through subordinate managers, departmental multi-function programs or operations.
<input type="checkbox"/>	<b>Level 5</b> Scheduling, supervision, and evaluation of work as a superior of those in level 4.

**List the names of the Department(s)/Division(s) supervised/managed by this job:**

- DHR, Retirement Plan Services

Are there subordinate supervisors/managers reporting to this job?  Yes  No If yes, how many?

**Fiscal Responsibility:**

Responsible for annual operating budget for department(s)/division(s)?  Yes  No If yes, please provide total amount?

**- Go To Next Page -**

**H. WORKING CONDITIONS**

What are the physical, mental and environment demands for this job? Functions identified must coincide with the description of essential duties and responsibilities for this job. The functions should focus on what is to be done and the processes traditionally used to achieve end results. For each of the following functional requirements, indicate the frequency in which it occurs in this job.

<b>PHYSICAL DEMANDS</b>	<b>N/A</b>	<b>Seldom (&lt;25%)</b>	<b>Occasional (25% - 50%)</b>	<b>Frequent (50% - 75%)</b>	<b>Always (&gt;75%)</b>
Standing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walking/Running	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sitting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reaching	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bending/Kneeling	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hearing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Talking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Visual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Typing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Fine Dexterity	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manual Dexterity	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upper Extremity Repetitive Motion	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting/Carrying 20 lbs.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pushing/Pulling 20 lbs.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>NON-PHYSICAL DEMANDS</b>	<b>N/A</b>	<b>Seldom (&lt;25%)</b>	<b>Occasional (25% - 50%)</b>	<b>Frequent (50% - 75%)</b>	<b>Always (&gt;75%)</b>
Analysis/Reasoning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Communication/Interpretation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Math/Mental Computation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reading	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sustained Mental Activity (i.e. auditing, problem solving, grant writing, composing reports)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>				
<b>ENVIRONMENTAL DEMANDS</b>	<b>N/A</b>	<b>Seldom (&lt;25%)</b>	<b>Occasional (25% - 50%)</b>	<b>Frequent (50% - 75%)</b>	<b>Always (&gt;75%)</b>
Work Alone	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Frequent Task Changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Tedious/Exacting Work	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High Volume Public Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Dust	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Temperature Extremes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loud Noises	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Danger	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toxic Substances (i.e. solvents, pesticides, etc.)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>				

<b>WORK SCHEDULE:</b> Please select all that apply.	
<input checked="" type="checkbox"/>	Routine shift hours. Infrequent overtime, weekend, or shift rotation.
<input type="checkbox"/>	Considerable irregularity of hours due to frequent overtime, weekend or shift rotation.
<input type="checkbox"/>	Regular and/or frequent on-call availability.
<input type="checkbox"/>	Nature of work frequently requires irregular, unpredictable or particularly long hours. (I.e. covering double shifts, etc.)

<b>DEMANDS/DEADLINES:</b> Please select all that apply.	
<input type="checkbox"/>	Little or no stress created by work, employees, or public.
<input checked="" type="checkbox"/>	Occasional stress due to deadlines or workload because of intermittent or cyclical work pressures, or occasional exposure to distressed individuals within the immediate work environment.
<input type="checkbox"/>	High volume and variable work demands and deadlines impose strain on routine basis or considerable stress intermittently; OR regular direct contacts with distressed individuals within the immediate work environment; and/or exposure to demands and pressures from persons other than immediate supervisor.
<input type="checkbox"/>	Work requires frequent, substantive contacts with people in highly stressful situations; delicacy and unpredictability of contacts routinely creates considerable strain or heavy stress regularly.

**I. EDUCATION, EXPERIENCE AND LICENSE**

<b>EDUCATION</b>	
Please indicate the MINIMUM educational level required:	
<input type="checkbox"/>	HS Diploma/GED
<input type="checkbox"/>	Associate's Degree
<input checked="" type="checkbox"/>	Bachelor's Degree
<input type="checkbox"/>	Graduate Degree
<input type="checkbox"/>	Post Graduate Degree (PhD)
<input type="checkbox"/>	Professional Degree (Law, Medicine, etc.)
<input type="checkbox"/>	Other:
	Area of specialization/major:
	Area of specialization/major: Business, HR, Public Admin, other
	Area of specialization/major:
	Area of specialization/major:
	Area of specialization/major:
	Please indicate:

<b>WORK EXPERIENCE</b>	
Please indicate the MINIMUM number of years of practical experience required.	
<input type="checkbox"/>	No experience
<input type="checkbox"/>	Less than one year
<input type="checkbox"/>	One to three years
<input checked="" type="checkbox"/>	Three to five years
<input type="checkbox"/>	Five or more years
	Area(s) of experience:
	Area(s) of experience:
	Area(s) of experience: Benefits, DB Pension, Retirement, Public Administration
	Area(s) of experience:

<b>SUPERVISORY/MANAGEMENT EXPERIENCE</b>	
Please indicate the MINIMUM number of years of supervisory/management experience required.	
<input type="checkbox"/>	No experience
<input type="checkbox"/>	Less than one year
<input type="checkbox"/>	One to three years
<input checked="" type="checkbox"/>	Three to five years
<input type="checkbox"/>	Five or more years
	Area(s) of experience:
	Area(s) of experience:
	Area(s) of experience: Office Environment (semi-professional/clerical staff)
	Area(s) of experience:

<b>LICENSE/CERTIFICATION:</b>
What license(s), certification/certificate(s), registration(s), or other regulatory requirements/training:
Certified Employee Benefits Specialist, Certified Retirement Counselor Preferred

**J. ADDITIONAL COMMENTS**

Please list additional items not covered in this questionnaire that you feel would be helpful in understanding the job.
<ul style="list-style-type: none"> <li>Serves as Retirement Services Manager. Backs up Director of Retirement Services in all day to day operations.</li> </ul>

K. SIGNATURES:

Item 5.0

<b>SUPERVISOR'S/MANAGER'S CONFIRMATION:</b> I have completed and/or reviewed the contents of this job evaluation questionnaire and consent to its accuracy.	
Supervisor/Manager Signature: <i>Marian Nunneman</i>	Date: 08/05/2015
Department/Division Head Signature:	Date:

Email the completed form to: [HRCompensation@milwcnty.com](mailto:HRCompensation@milwcnty.com). Please ensure the subject line includes the request type and Department (High Org.) number. (I.e. 2013 STUDY 1140)

Received by Human Resources - Compensation Department  
Analyzed by Human Resources - Compensation Department

Initials:  
Initials:

Date:  
Date:



Office of Emergency Management [OEM]

**Milwaukee County**

Christine Westrich, Director OEM

M. Riccardo Colella, DO, MPH, FACEP, Director of Medical Services

8.10.2015

Dear Ms. Kerry Mitchell,

I respectfully request to transfer the EMS Division Director position from classified service to unclassified.

This position is charged with the execution and sustainment of an evolution in creating new revenue streams, changing the education model in conjunction with MATC, implementing the new Mobile Integrated Health initiative, and the consolidation of the EMS Communications Center with the 911 County Communications Center.

The new leader will also be responsible for the execution and implementation of the \$2.0M subsidies currently provided to nine municipal fire departments. The contract renewal is due in 2017 and represents a critical link to municipal participation in the County EMS system, allowing unified governance and medical direction.

Additionally, new contractual agreements with receiving hospitals such as Froedtert, Wheaton, Aurora, St. Mary's, Children's, etc. will be explored as a means to sustain the efforts of the Office of Emergency Management along with local fire departments. The EMS Division Director will interact with local Fire Chiefs, hospital Chief Medical Officers, health system Chief Executive Officers and multiple board of directors mandating a leader of the highest caliber with notable skills in negotiation and healthcare.

In summary, Milwaukee County is establishing itself as a leader in EMS systems, implementing a progressive paradigm shift in EMS services, cost model adoption, education and consolidated command center services. This task requires a leader that has 100% accountability through the ability to manage early release and appointment through the acute judgment of the Director of OEM.

Your thoughtful consideration is much appreciated.

Sincerely,

A handwritten signature in black ink that reads 'Christine Westrich'.

Christine Westrich  
Director, Office of Emergency Management

**OEM**

County Executive Chris Abele

Director OEM  
Christine Westrich



### Radio Services Division

### 911 Communications Division

### Emergency Medical Services Division

### Emergency Management Division

Director Erik Viel

1 Radio O&M  
Hugh Morris

1 Project Mgr  
CDX Solutions

1 PM  
Motorola

2 Radio Tech's  
Stratagem

1 Radio Tech  
Motorola

Manager  
Lesley Kenney

1 Supervisor  
Sue Robinson

3 Lead Dispatchers

17 Dispatchers

1 Dispatcher

3 Dispatchers

1 Mapping Specialist

EMS Div. Director  
TBD

MCW Medical Dir.

EMS Comm. Ctr  
1 Lead Dispatcher

7 Dispatchers

1 Administrator

1 Education Mgr

0.5 Clerical  
5 Instructors

1 Quality Mgr

2 Asst's

1 Health Info Mgr

2 Tech's

1 Administrator  
Carl Stenbol

1 EM Coord.  
Barry Mitchell

1 EPCRA Coord.  
Gene Hibbler

1 EM Coord.

1 EM Coord.

To be hired

Vacant

Staff contractor



## MILWAUKEE COUNTY JOB EVALUATION QUESTIONNAIRE

This form is designed to assist you in describing your departmental job. You are asked to fill this form out to outline the essential duties and responsibilities; and identify the knowledge, skills and abilities required to successfully perform the job. This form is used to request new job classifications, review current classifications, reclassification, reallocations, and general updates to the job description. **Note:** It is the job that is being evaluated, not the position/incumbent. Thank you for your cooperation.

**GENERAL INSTRUCTIONS:**

1. Before beginning, please look over the entire questionnaire. Each question should be answered completely and accurately. If a question does not apply to this job, please indicate "N/A" (Not Applicable).
2. To complete the questionnaire, please type and/or select your responses.
3. If you wish to make additional comments, please use the space available in the "Additional Comments" section on page 6 of this questionnaire.

**A. JOB IDENTIFICATION INFORMATION:**

<b>Department (High Org):</b>	480	<b>Division (Low Org):</b>	4841
<b>Contact for this Study</b>	Name: Christine Westrich	Email: CHRISTINE.WESTRICH@	
	Title: Director, OEM	Phone: x4751	
<b>Current Job Title:</b>	EMS Instructor & Adm Asst NR Exempt	<b>Current Job Code:</b>	54820
<b>Job Reports To:</b>	Title: New title, EMS Division Director (reports Dir OEM)		
<b>Request Type:</b>	<input checked="" type="checkbox"/> Establish New <input type="checkbox"/> Review <input type="checkbox"/> Reclassification <input type="checkbox"/> Reallocation <input type="checkbox"/> Update Description <input type="checkbox"/> Other, Specify		

**B. JUSTIFICATION STATEMENT:**

<b>1. Attach an organizational chart.</b>	
<b>2. Explain the events or changes that made this request necessary.</b>	
The County's Medical Director (from Medical College of Wis.) is acting as interim division director. The former EMS Program Director was, and is, filling a role as day-to-day administrator. A Div Dir is needed to execute the strategic vision/mission/goals of EMS in conjunction w/significant national health care reforms and demands from first responders and local health systems for efficacy and modernization.	

**C. ABOUT THE JOB:**

<b>Job Status:</b>	<input checked="" type="checkbox"/> Regular Full-Time	<input type="checkbox"/> Regular Part-Time	<input type="checkbox"/> Seasonal	<input type="checkbox"/> Contract
<b>Shift:</b>	<input checked="" type="checkbox"/> Day	<input type="checkbox"/> Evening	<input type="checkbox"/> Night	<input type="checkbox"/> Other:
<b>Hours Per Week:</b>	<input checked="" type="checkbox"/> >40 Hours	<input type="checkbox"/> 32-40 Hours	<input type="checkbox"/> 20-32 Hours	<input type="checkbox"/> <20 Hours
<b>Travel:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No    If Yes, % Travel 5-10%			
<b>Will This Job Supervise/Manage?</b>	<input type="checkbox"/> Supervise		<input checked="" type="checkbox"/> Manage # of Direct Reports: 6	<input type="checkbox"/> N/A

**D. JOB SUMMARY:**

<b>Briefly state, in several sentences, the principle purpose or function of the job. Respond by describing <i>What</i> the job is, <i>What</i> its major objective is, and <i>Why</i> does it exist.</b>	
Principal purpose is to lead significant changes in EMS system and to sustain the evolution. The job is leadership, on course vision implementation, alignment w/critical health care reforms. Major obj: creating new hospital & fire dept revenue streams, changing education model in conjunction w/MATC, implementing mobile integrated health, & consolidating EMS w/911 Comm Ctr. Necessary leadership role or EMS will dissolve.	

**E. ESSENTIAL DUTIES/RESPONSIBILITIES:**

Item 6.0

**JOB RESPONSIBILITY LIST:** Please describe the major elements of the job. List only the major functions, separately, in order of importance. Provide a one or two line descriptive statement for each duty so that someone not familiar with this kind of work can understand it. Weight the approximate percentage of allocated work time for each functional work activity (Round to the nearest 5%). We do not need to know HOW the function is to be performed, but rather, WHAT it is to be performed. **Percentages should add up to 100%**

1.	<input type="checkbox"/> Original <input checked="" type="checkbox"/> New	Job Duty: Lead, manage and motivate 6 managers, total staff of 45 persons.	% of Time: 25
	<i>Descriptive:</i> EMS diversity requires a leader to cooperatively align varying essential functions which serve paramedics, hospitals, fire departments, primary care providers, private ambulance companies, and most importantly, patients.		
2.	<input type="checkbox"/> Original <input checked="" type="checkbox"/> New	Job Duty: External partnership w/major health care providers.	% of Time: 15
	<i>Descriptive:</i> Execution & implementation of contracts & MOUs with Froedtert, Wheaton, Aurora, etc., alternative care facilities, primary care providers, hospice centers and fire departments with significant budgetary impacts. Meet hospital requirements for trauma/triage alerting.		
3.	<input type="checkbox"/> Original <input checked="" type="checkbox"/> New	Job Duty: External partnership w/14 local fire departments.	% of Time: 15
	<i>Descriptive:</i> Execution & implementation of 9 municipal fire department contracts totalling \$2.0M. Education & training of 467 paramedics, watchdog for policy/procedure compliance, data measurements and nationwide benchmarking of EMS services.		
4.	<input type="checkbox"/> Original <input checked="" type="checkbox"/> New	Job Duty: Management of medical direction and medical control.	% of Time: 15
	<i>Descriptive:</i> Execution & implementation of \$285k contract w/Medical College of Wis for medical direction and control of all County paramedics, County departments, and receiving hospitals. Research w/MCW to improve patient outcome and reduce emergency room readmission/recidivism.		
5.	<input type="checkbox"/> Original <input checked="" type="checkbox"/> New	Job Duty: Management of diverse Mobile Integrated Health initiative.	% of Time: 15
	<i>Descriptive:</i> Implementation & sustainment of Affordable Care Act health reforms w/Mobile Integrated Health initiative involving contractual agreements w/hospice centers, hospitals, and fire departments. Establishing & maintaining revenue streams and capital improvement funds.		
6.	<input type="checkbox"/> Original <input checked="" type="checkbox"/> New	Job Duty: Communications Center consolidation and management.	% of Time: 15
	<i>Descriptive:</i> Implementation & sustainment of 5-year plan to consolidate 9-1-1 communications centers with EMS and OEM 9-1-1. Execution of contractual agreements w/receiving hospitals for services, managing cost model, revenues and capital improvement fund for design/build/expansion.		
7.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		
8.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		
9.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		
10.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		

**F. EQUIPMENT, TOOLS & MATERIALS**

Item 6.0

Please list all equipment, tools or materials required to perform the job along with the frequency.	Frequency			Type of Equipment
	Daily	Weekly	Monthly	
1. Machinery: (i.e. Vehicles, Motorized Equipment, Heavy Machinery, etc)	X			Motor vehicle, SUV
2. Hand Tools/Instruments: (i.e. Power Tools, PC's, office or laboratory equipment, weapons, etc.)	X			PC's, new IT software, EMS narcotics, supplies, heart monitors, etc.
3. Driving required?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

**G. JOB COMPETENCIES**

<b>Internal/External Contacts:</b> Please select all that apply.	
<input checked="" type="checkbox"/>	Exchange of basic information with internal and/or external contacts.
<input checked="" type="checkbox"/>	Maintain sensitive or confidential information.
<input checked="" type="checkbox"/>	Explain and gather information, answer queries, or provide assistance to internal and/or external contacts.
<input checked="" type="checkbox"/>	Persuade, conform or recommend course of action with internal and/or external contacts.
<input checked="" type="checkbox"/>	Perform with a high degree of authority in securing understanding and cooperation with internal and/or external contacts.
<input checked="" type="checkbox"/>	Maintain a continuing working relationship that can have a significant effect on the success of the organization.

<b>Communication Skills:</b> Select the level of language (ability to read, write and speak needed to successfully accomplish the essential duties of the job.) Please select all that apply.	
<input checked="" type="checkbox"/>	Read, write and comprehend simple instructions, reports, short correspondence and memos.
<input checked="" type="checkbox"/>	Speak effectively before both internal and/or external groups.
<input checked="" type="checkbox"/>	Read, analyze, and interpret safety rules, operating/maintenance instructions and procedure manuals, scientific/technical journals and procedures, government regulations, financial and legal documents.
<input checked="" type="checkbox"/>	Prepare and/or present written communications that pertain to controversial and complex topics.

<b>Decision-Making:</b> Please select <u>only one</u> of the following:	
<input type="checkbox"/>	Makes minimal decision-making responsibility.
<input type="checkbox"/>	Makes decisions of responsibility involving evaluation of information; decisions may require development or application of alternatives or precedents.
<input type="checkbox"/>	Makes decisions of responsibility and final results that affect more than one department or a department with multiple units; substantial analysis is required and many factors must be weighed before a decision can be reached.
<input checked="" type="checkbox"/>	Makes decisions of responsibility and final recommendations, which may result in the formulation of strategic plans of action to achieve the broad objectives for the organization; involves long-range future planning including scope, direction and goals.

<b>Complexity, Judgment and Problem Solving:</b> Please select all that apply.	
<input checked="" type="checkbox"/>	Understand and follow instructions.
<input checked="" type="checkbox"/>	Execute decisions within limits of standard policy and procedures.
<input checked="" type="checkbox"/>	Interpret and adapt to established practices and procedures using independent judgment to meet situations to which applications are not clearly defined.
<input checked="" type="checkbox"/>	Perform within difficult or complex working conditions or situations not easily evaluated; decisions require considerable judgment, initiative and ingenuity in areas there is little precedent.
<input checked="" type="checkbox"/>	Act independently in the formulation and administration of policies and programs for major departments or functions.

<b>Please list all Technology, Systems and Software Knowledge required to perform the job:</b>			
Basic	Intermediate	Advanced	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Knowledge of all related computer and software applications, such as word processing and spreadsheets.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:

**Supervisory/Managerial:** If applicable, select the appropriate level of responsibility. Item 6.0

**Level 1** This position has no supervisory/managerial responsibilities.

**Level 2** General instructing, scheduling and reviewing the work of others as a "lead worker"; functional supervisor only.

**Level 3** Scheduling, supervision and evaluation of work; recommends personnel actions (hiring, termination and/or pay changes).  
Are there subordinate supervisors/managers reporting to this job?  Yes  No If yes, how many?

**Level 4** Scheduling, supervision and evaluation of work; recommends personnel actions (hiring, termination and/or pay changes); administers through subordinate management, departmental programs or operations.  
Are there subordinate supervisors/managers reporting to this job?  Yes  No If yes, how many? 6 MANAGERS

**List the names of the Department(s)/Division(s) supervised/managed by this job:**

- 1) MCW Medical Direction Dept, 2) EMS Program Administration, 3) EMS Education Division, 4) EMS Quality Assurance Division,
- 5) EMS Health Information Management Division, 6) EMS Communications Center

**Fiscal Responsibility:**

Responsible for annual operating budget for department(s)/division(s)?  Yes  No If yes, please provide total amount? \$5.6 M

**H. WORKING CONDITIONS**

What are the physical, mental and environment demands for this job? Functions identified must coincide with the descriptive statement of essential duties and responsibilities for this job. The functions should focus on what is to be done and the processes traditionally used to achieve end results. For each of the following functional requirements, indicate the frequency in which it occurs in this job.

<b>PHYSICAL DEMANDS</b>	<b>N/A</b>	<b>Seldom (&lt;25%)</b>	<b>Occasional (25% - 50%)</b>	<b>Frequent (50% - 75%)</b>	<b>Always (&gt;75%)</b>
Standing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Walking/Running	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sitting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reaching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Climbing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bending/Kneeling	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hearing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Talking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Visual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Typing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Fine Dexterity	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manual Dexterity	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upper Extremity Repetitive Motion	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Lifting/Carrying (lbs.)	<input type="checkbox"/> up to 05	<input type="checkbox"/> up to 10	<input type="checkbox"/> up to 15	<input type="checkbox"/> up to 20	<input type="checkbox"/> up to 25	<input checked="" type="checkbox"/> up to 30	<input type="checkbox"/> up to
Pushing/Pulling (lbs.)	<input type="checkbox"/> up to 05	<input type="checkbox"/> up to 10	<input type="checkbox"/> up to 15	<input type="checkbox"/> up to 20	<input type="checkbox"/> up to 25	<input checked="" type="checkbox"/> up to 30	<input type="checkbox"/> up to

<b>NON-PHYSICAL DEMANDS</b>		<b>N/A</b>	<b>Seldom (&lt;25%)</b>	<b>Occasional (25% - 50%)</b>	<b>Frequent (50% - 75%)</b>	<b>Always (&gt;75%)</b>
Analysis/Reasoning		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Communication/Interpretation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Math/Mental Computation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reading		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sustained Mental Activity (i.e. auditing, problem solving, grant writing, composing reports)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other:	LISTENING, ANALYSIS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>ENVIRONMENTAL DEMANDS</b>		<b>N/A</b>	<b>Seldom (&lt;25%)</b>	<b>Occasional (25% - 50%)</b>	<b>Frequent (50% - 75%)</b>	<b>Always (&gt;75%)</b>
Work Independently		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Task Changes		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Tedious/Exacting Work		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
High Volume Public Contact		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Dust		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Temperature Extremes		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loud Noises		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Physical Danger		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toxic Substances (i.e. solvents, pesticides, etc.)		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**WORK SCHEDULE:** Please select all that apply.

Routine shifts hours. Infrequent overtime, weekend, or shift rotation.

Considerable irregularity of hours due to frequent overtime, weekend or shift rotation.

Regular and/or frequent on-call availability; nature of work frequently requires irregular, unpredictable or particularly long hours.

**DEMANDS/DEADLINES:** Please select all that apply.

Little or no stress created by work, employees or public.

Intermittent or cyclical work pressures with occasional exposure to high stress work environments.

High volume and variable work demands and deadlines that impose strain on a routine basis; frequent direct contact with individuals or exposure to highly stressful situation, demands or pressures.

**I. EDUCATION, EXPERIENCE AND LICENSE**

**EDUCATION**  
Please indicate the MINIMUM educational level required:

HS Diploma/GED

Associate's Degree Area of specialization/major:

Bachelor's Degree Area of specialization/major: Health Care, Engineering, Business

Graduate Degree Area of specialization/major:

Post Graduate Degree (PhD) Area of specialization/major:

Professional Degree (Law, Medicine, etc.) Area of specialization/major:

Other: Please indicate:

**WORK EXPERIENCE**  
Please indicate the MINIMUM number of years of practical experience required.

No experience

Less than one year Area(s) of experience:

One to three years Area(s) of experience:

Three to five years Area(s) of experience:

Five or more years Area(s) of experience:

**SUPERVISORY/MANAGEMENT EXPERIENCE**

Item 6.0

Please indicate the MINIMUM number of years of supervisory/management experience required.

<input type="checkbox"/> No experience	
<input type="checkbox"/> Less than one year	Area(s) of experience:
<input type="checkbox"/> One to three years	Area(s) of experience:
<input checked="" type="checkbox"/> Three to five years	Area(s) of experience: Management experience
<input type="checkbox"/> Five or more years	Area(s) of experience:

**LICENSE/CERTIFICATION:**

What license(s), certification/certificate(s), registration(s), or other regulatory requirements/training:

- 
- 
- 
- 
- 
- 

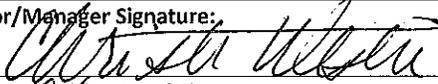
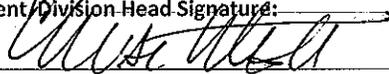
**J. ADDITIONAL COMMENTS**

Please list additional items not covered in this questionnaire that you feel would be helpful in understanding the job.

- This position is responsible to turn-around a stagnant EMS system, requiring cooperation/collaboration from numerous external agencies. The Director must reinvent cost models directly affecting 16 hospitals and 14 fire departments. The Director must complete consolidation of two emergency communications center and further expand/design/build a countywide command center.
- These changes have gravitas that will garner nationwide attention and will change the face of paramedic care for significant improvements in patient outcome and greater community resiliency in our county.

**K. SIGNATURES:****SUPERVISOR'S/MANAGER'S CONFIRMATION:**

I have completed and/or reviewed the contents of this job evaluation questionnaire and consent to its accuracy.

Supervisor/Manager Signature: 	Date: 6.30.2015
Department/Division Head Signature: 	Date: 6.30.2015

Email the completed form to: [HRCompensation@milwcnty.com](mailto:HRCompensation@milwcnty.com). Please ensure the subject line includes the request type and Department (High Org.) number. (I.e. 2013 STUDY 1140)

Received by Human Resources - Compensation Department  
Analyzed by Human Resources - Compensation Department

Initials:  
Initials:

Date:  
Date:



DEPARTMENT OF FAMILY CARE  
**Milwaukee County**

MARIA LEDGER, Director  
 Maria.Ledger@milwaukeecounty.com

Phone: (414) 287-7600  
 FAX: (414) 287-7704  
 TTY: (414) 287-7601  
 Toll Free: (877) 489-3814

**Milwaukee County  
 Family Care  
 Governing Board**

**Maria Rodriguez**  
 Chairperson

E. B. Coleman  
 Joe Entwisle  
 Jeanne Fehr  
 Gwendolyn Jackson  
 Supervisor Willie Johnson, Jr.  
 Jung Kwak  
 Joanne Lipo Zovic  
 Paula K. Lorant  
 Mary McClintock  
 Supervisor Peggy A. Romo West  
 Mary Sawicki

Date June 5, 2015

To: Milwaukee County Civil Service Commission

From: Maria Ledger, Director, Department of Family Care 

Subject: Request to Transfer a Position from the Classified  
 Service to the Unclassified Service—Nursing  
 Program Director

**Request**

The Department of Family Care requests that the position of Nursing Program Director be changed to an unclassified service position.

**Background/ Analysis**

The Nursing Program Director for the Department of Family Care is a high level executive with primary responsibility for assisting the Department Director and the Department Medical Director to provide leadership and direction to nurses and nursing practice within MCDFC's Family Care Program planning and establishing the protocols necessary to provide high quality acute and primary health care services for over 8,400 members in eight (8) counties in Southeastern Wisconsin. The position serves as a member of the Department Senior Administrative staff.

The major objectives of this position are:

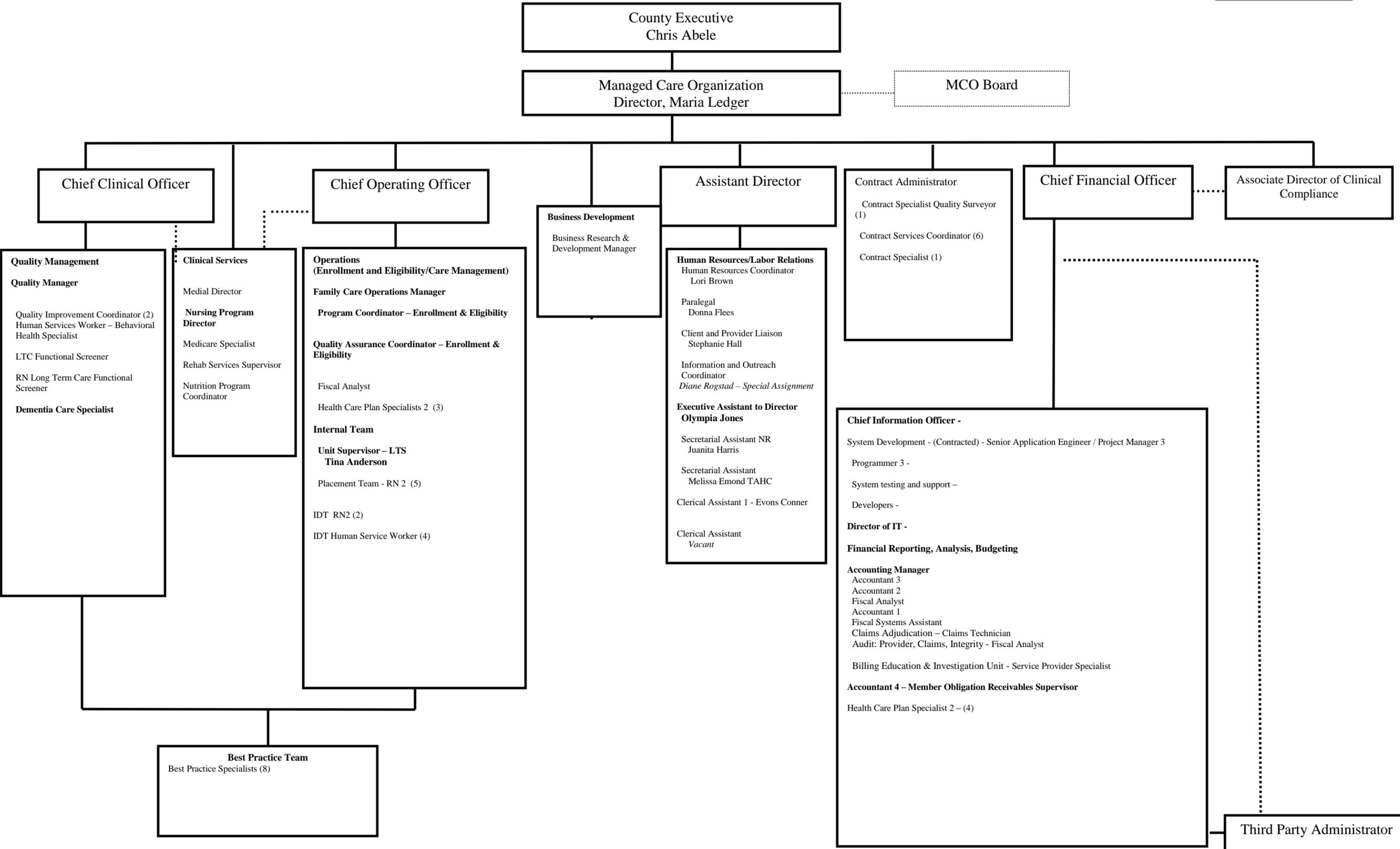
1. Coordination of Acute Care Systems Development
2. Clinical Mentoring and Oversight
3. Best Clinical Practices Development
4. Supervise the activities of Medicare Coordinator, Registered Dietitian and Rehabilitation Services Supervisor

The position exists because the Milwaukee County Department of Family Care is now required by the State of Wisconsin Department of Health Services (DHS) to become an Integrated Health Agency (IHA). To achieve this, the Department must successfully obtain a license from the State of Wisconsin Office of the Commissioner of Insurance (OCI) to function as a Health Maintenance Organization (HMO).

This position reports to the Medical Director who reports to the Department Director who in turn reports to the County Executive. This is a relatively new position which must be adapted to meet the changing requirements of the State DHS, under whose contract the Department of Family Care functions.

A review of the duties and responsibilities for the position identified above indicates that the position qualifies for inclusion in the unclassified service as specified in Wisconsin State Statutes 63.03 (3)(a). I have attached a copy of the position description for the position in addition to the organizational chart for your reference.

Thank you for your consideration of this request. I will be available to answer any questions you may have.





### MILWAUKEE COUNTY JOB EVALUATION QUESTIONNAIRE

This form is designed to assist you in describing your departmental job. You are asked to fill this form out to outline the essential duties and responsibilities; and identify the knowledge, skills and abilities required to successfully perform the job. This form is used to request new job classifications, review current classifications, reclassification, reallocations, and general updates to the job description. **Note:** It is the job that is being evaluated, not the position/incumbent. Thank you for your cooperation.

**GENERAL INSTRUCTIONS:**

1. Before beginning, please look over the entire questionnaire. Each question should be answered completely and accurately. If a question does not apply to this job, please indicate "N/A" (Not Applicable).
2. To complete the questionnaire, please type and/or select your responses.
3. If you wish to make additional comments, please use the space available in the "Additional Comments" section on page 6 of this questionnaire.

**A. JOB IDENTIFICATION INFORMATION:**

<b>Department (High Org):</b>	FAMILY CARE (MCDFC)	<b>Division (Low Org):</b>	7991
<b>Contact for this Study</b>	Name: Maria Ledger	Email: MARIA.LEDGER@MILWAUKEECOUNTY.COM	
	Title: Director	Phone: 414-287-7610	
<b>Current Job Title:</b>	Nursing Program Director		
<b>Job Reports To:</b>	Title: Chief Clinical Officer		
<b>Request Type:</b>	<input type="checkbox"/> Establish New <input type="checkbox"/> Review <input type="checkbox"/> Reclassification <input type="checkbox"/> Reallocation <input checked="" type="checkbox"/> Update Description <input type="checkbox"/> Other, Specify		

**B. JUSTIFICATION STATEMENT:**

<b>1. Attach an organizational chart.</b>
<b>2. Explain the events or changes that made this request necessary.</b>
The organization has been growing and positions such as the OT/PT, Medicare Consultant, and Nutritionist were recently created. This necessitated expanding the scope of this position to include the supervision of staff.

**C. ABOUT THE JOB:**

<b>Job Status:</b>	<input checked="" type="checkbox"/> Regular Full-Time	<input type="checkbox"/> Regular Part-Time	<input type="checkbox"/> Seasonal	<input type="checkbox"/> Contract
<b>Shift:</b>	<input checked="" type="checkbox"/> Day	<input type="checkbox"/> Evening	<input type="checkbox"/> Night	<input type="checkbox"/> Other:
<b>Hours Per Week:</b>	<input type="checkbox"/> >40 Hours	<input checked="" type="checkbox"/> 32-40 Hours	<input type="checkbox"/> 20-32 Hours	<input type="checkbox"/> <20 Hours
<b>Travel:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No    If Yes, % Travel 15%			
<b>Will This Job Supervise/Manage?</b>	<input checked="" type="checkbox"/> Supervise <input checked="" type="checkbox"/> Manage		<input type="checkbox"/> N/A	# of Direct Reports: 3

**D. JOB SUMMARY:**

Briefly state, in several sentences, the principle purpose or function of the job. Respond by describing <b>What</b> the job is, <b>What</b> its major objective is, and <b>Why</b> does it exist.
This position is designed to provide leadership and direction to nurses and nursing practice within MCDFC's Family Care Program.

E. ESSENTIAL DUTIES/RESPONSIBILITIES:

Item 7.0

**JOB RESPONSIBILITY LIST:** Please describe the major elements of the job. List only the major functions, separately, in order of importance. Provide a one or two line descriptive statement for each duty so that it can be understood by someone not familiar with this kind of work. Weight the approximate percentage of allocated work time for each functional work activity (Round to the nearest 5%). We do not need to know HOW the function is to be performed, but rather, WHAT it is to be performed. **Percentages should add up to 100%**

1.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Coordination of Acute Care Systems Development	% of Time: 20
	<i>Descriptive:</i> Assess, develop and evaluate effective means of coordinating acute and primary care services for Family Care members		
2.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Clinical Mentoring and Oversight	% of Time: 20
	<i>Descriptive:</i> Work in collaboration with the inter-disciplinary team RNs to provide clinical guidance.		
3.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Best Clinical Practices Development	% of Time: 20
	<i>Descriptive:</i> Work with multiple internal teams and workgroups including the MCO Operations to develop the Wellness and Prevention Plan; health and wellness/clinical policies, procedures; and research supported best clinical practices		
4.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Service Coordination	% of Time: 15
	<i>Descriptive:</i> Collaborate with MCO Contract staff on provider service coordination for members and the MCO Clinical Operations & providers on establishment and monitoring of quality indicators related to member clinical outcomes		
5.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Quality Improvement	% of Time: 10
	<i>Descriptive:</i> Work with Quality Manager and other MCO staff on Performance Improvement Projects (PIP) and initiatives		
6.	<input type="checkbox"/> Original <input checked="" type="checkbox"/> New	Job Duty: Staff Supervision	% of Time: 10
	<i>Descriptive:</i> Mentor and direct various clinical staff (e.g. Nutritionist, Therapy, etc) to ensure efficiency and responsiveness to meet MCO needs		
7.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Other Duties as Assigned	% of Time: 5
	<i>Descriptive:</i> Special projects		
8.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		
9.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		
10.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		

**F. EQUIPMENT, TOOLS & MATERIALS**

Item 7.0

Please list all equipment, tools or materials required to perform the job along with the frequency.	Frequency			Type of Equipment
	Daily	Weekly	Monthly	
1. Machinery: (i.e. Vehicles, Motorized Equipment, Heavy Machinery, etc)		yes		vehicle
2. Hand Tools/Instruments: (i.e. Power Tools, PC's, office or laboratory equipment, weapons, etc.)	yes			Personal Computer, phone, Fax/Copier and other office equipment
3. Driving required?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

**G. JOB COMPETENCIES**

<b>Internal Contacts:</b> Please select all that apply.	
<input checked="" type="checkbox"/>	Contact with employees or others primarily at a routine level involving basic information exchange.
<input checked="" type="checkbox"/>	Contact with peers and others involving explanation of information (these contacts may be within or outside department or division), and the gathering of factual information. May include the communication of sensitive or confidential information.
<input checked="" type="checkbox"/>	Contact across departments or divisions with employees involving persuasion of others, absent formal authority, to conform to a policy interpretation or recommended course of action.
<input type="checkbox"/>	Contact that requires a high degree of authority in securing understanding and cooperation of multiple departments or interests.

<b>External Contacts:</b> Please select all that apply.	
<input type="checkbox"/>	No contact with people outside the organization.
<input type="checkbox"/>	Limited external contact to: gather information, answer queries, or ask assistance.
<input checked="" type="checkbox"/>	Frequent external contact to: gather information, answer queries, or ask assistance.
<input checked="" type="checkbox"/>	External contact involving a requirement to maintain a continuing external working relationship with individuals, or organizations.
<input type="checkbox"/>	External contact involving the initiation and maintenance of relationships that can have a significant effect on the success of the organization.

<b>Communication Skills:</b> Select the level of language (ability to read, write and speak needed to successfully accomplish the essential duties of the job.) Please select all that apply.	
<input type="checkbox"/>	Read, write and comprehend simple instructions, short correspondence and memos.
<input checked="" type="checkbox"/>	Read and interpret safety rules, operating/maintenance instructions and procedure manuals.
<input checked="" type="checkbox"/>	Write routine reports, correspondence, and speak effectively before both internal and external groups.
<input checked="" type="checkbox"/>	Read, analyze, and interpret business manuals, technical procedures and/or government regulations.
<input checked="" type="checkbox"/>	Read, analyze, and interpret scientific and technical journals, financial reports and legal documents.
<input type="checkbox"/>	Prepare and/or present written communications that pertain to controversial and complex topics.

<b>Decision-Making:</b> Please select <u>only one</u> of the following:	
<input type="checkbox"/>	Requires minimal decision-making responsibility.
<input type="checkbox"/>	Regularly makes decisions involving how a project or operation will be conducted (i.e. sequence or method), and generally from an available set of alternatives or precedents.
<input type="checkbox"/>	Regularly makes decisions of responsibility, involving evaluation of information. Decisions may require development or application of alternatives or precedents.
<input checked="" type="checkbox"/>	Regularly makes significant decisions and final results, typically affecting the entire department. Available guides or precedents are limited. Has authority over the allocation of resources.
<input type="checkbox"/>	Significant responsibility for decisions and final results, affecting more than one department or a department with multiple units. Substantial analysis is required and many factors must be weighed before a decision can be reached.
<input type="checkbox"/>	Major responsibility for decisions and final recommendation, which may result in the formulation of strategic plans of action to achieve the broad objectives for the organization.
<input type="checkbox"/>	Primary work responsibility involves the long-range future including the scope, direction and goals of the organization.

<b>Complexity, Judgment and Problem Solving:</b> Please select all that apply. <span style="float: right;">Item 7.0</span>	
<input type="checkbox"/>	Work of a relatively routine nature. Requires the ability to understand and follow instructions.
<input type="checkbox"/>	Structured work, following a limited variety of standard practices.
<input type="checkbox"/>	Generally structured work, but involving a choice of action within limits of standard policy and procedures.
<input checked="" type="checkbox"/>	Generally diversified and moderately difficult work. Requires judgment in the adaptation and interpretation of established practices and procedures to meet problems and situations to which the application is not clearly defined.
<input checked="" type="checkbox"/>	Typically difficult or complex work. Generally governed by broad instructions and objectives usually involving frequently changing conditions and problems.
<input checked="" type="checkbox"/>	Work requires the ability to plan and perform work in light of new or constantly changing problems, work from broad instruction, and deal with complex factors not easily evaluated. Decisions require considerable judgment, initiative, and ingenuity in areas there is little precedent.
<input checked="" type="checkbox"/>	Work requires the ability to act independently in the formulation and administration of policies and programs for major departments or functions.

<b>Supervisory/Managerial:</b> If applicable, select the appropriate level of responsibility.	
<input type="checkbox"/>	<b>Level 1</b> General instructing, scheduling, and reviewing the work of others performing the same or directly related work. Acts as "lead worker". Functional supervision only.
<input type="checkbox"/>	<b>Level 2</b> Recommends personnel actions (hiring, termination, pay changes). Involves scheduling, supervision, and evaluation of work of employees who perform similar work assignments.
<input checked="" type="checkbox"/>	<b>Level 3</b> Scheduling, supervision, and evaluation of work as a "manager" of the first line supervisors; or perform supervision of workers who perform distinct and separate blocks of work.
<input type="checkbox"/>	<b>Level 4</b> Scheduling, supervision, and evaluation of work as a superior of "managers". Administers through subordinate managers, departmental multi-function programs or operations.
<input type="checkbox"/>	<b>Level 5</b> Scheduling, supervision, and evaluation of work as a superior of those in level 4.

<b>List the names of the Department(s)/Division(s) supervised/managed by this job:</b>	
<ul style="list-style-type: none"> <li>• Direct Supervision of the Clinical Team (e.g. Nutritionist, OT/PT, Medicare Maximization Specialist)</li> <li>• Clinical and Quality Management Oversight of 120+ field nurses</li> <li>• Leadership and Management Oversight of 20 Care Management Unit Nurse Leaders</li> </ul>	

Are there subordinate supervisors/managers reporting to this job?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	If yes, how many? 20
---	---	----------------------

<b>Fiscal Responsibility:</b>		
Responsible for annual operating budget for department(s)/division(s)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	If yes, please provide total amount?

**- Go To Next Page -**

H. WORKING CONDITIONS

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What are the physical, mental and environment demands for this job? Functions identified must coincide with the descriptive statement of essential duties and responsibilities for this job. The functions should focus on what is to be done and the processes traditionally used to achieve end results. For each of the following functional requirements, indicate the frequency in which it occurs in this job.

<u>PHYSICAL DEMANDS</u>	N/A	Seldom (<25%)	Occasional (25% - 50%)	Frequent (50% - 75%)	Always (>75%)
Standing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walking/Running	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sitting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reaching	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bending/Kneeling	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hearing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Talking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Visual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Typing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Fine Dexterity	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manual Dexterity	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upper Extremity Repetitive Motion	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting/Carrying <10 lbs.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pushing/Pulling <10 lbs.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<u>NON-PHYSICAL DEMANDS</u>	N/A	Seldom (<25%)	Occasional (25% - 50%)	Frequent (50% - 75%)	Always (>75%)
Analysis/Reasoning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Communication/Interpretation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Math/Mental Computation	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reading	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sustained Mental Activity (i.e. auditing, problem solving, grant writing, composing reports)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other:	<input type="checkbox"/>				
<u>ENVIRONMENTAL DEMANDS</u>	N/A	Seldom (<25%)	Occasional (25% - 50%)	Frequent (50% - 75%)	Always (>75%)
Work Alone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Frequent Task Changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tedious/Exacting Work	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High Volume Public Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dust	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Temperature Extremes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loud Noises	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Danger	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toxic Substances (i.e. solvents, pesticides, etc.)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>				

**WORK SCHEDULE:** Please select all that apply.

<input checked="" type="checkbox"/>	Routine shift hours. Infrequent overtime, weekend, or shift rotation.
<input type="checkbox"/>	Considerable irregularity of hours due to frequent overtime, weekend or shift rotation.
<input type="checkbox"/>	Regular and/or frequent on-call availability.
<input type="checkbox"/>	Nature of work frequently requires irregular, unpredictable or particularly long hours. (I.e. covering double shifts, etc.)

**DEMANDS/DEADLINES:** Please select all that apply.

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<input type="checkbox"/>	Little or no stress created by work, employees, or public.
<input checked="" type="checkbox"/>	Occasional stress due to deadlines or workload because of intermittent or cyclical work pressures, or occasional exposure to distressed individuals within the immediate work environment.
<input checked="" type="checkbox"/>	High volume and variable work demands and deadlines impose strain on routine basis or considerable stress intermittently; OR regular direct contacts with distressed individuals within the immediate work environment; and/or exposure to demands and pressures from persons other than immediate supervisor.
<input type="checkbox"/>	Work requires frequent, substantive contacts with people in highly stressful situations; delicacy and unpredictability of contacts routinely creates considerable strain or heavy stress regularly.

**I. EDUCATION, EXPERIENCE AND LICENSE**

**EDUCATION**

Please indicate the MINIMUM educational level required:

<input type="checkbox"/> HS Diploma/GED	
<input type="checkbox"/> Associate's Degree	Area of specialization/major:
<input type="checkbox"/> Bachelor's Degree	Area of specialization/major:
<input checked="" type="checkbox"/> Graduate Degree	Area of specialization/major: Nursing
<input type="checkbox"/> Post Graduate Degree (PhD)	Area of specialization/major:
<input type="checkbox"/> Professional Degree (Law, Medicine, etc.)	Area of specialization/major:
<input type="checkbox"/> Other:	Please indicate:

**WORK EXPERIENCE**

Please indicate the MINIMUM number of years of practical experience required.

<input type="checkbox"/> No experience	
<input type="checkbox"/> Less than one year	Area(s) of experience:
<input type="checkbox"/> One to three years	Area(s) of experience:
<input checked="" type="checkbox"/> Three to five years	Area(s) of experience: experience working within a managed long-term care program
<input type="checkbox"/> Five or more years	Area(s) of experience:

**SUPERVISORY/MANAGEMENT EXPERIENCE**

Please indicate the MINIMUM number of years of supervisory/management experience required.

<input type="checkbox"/> No experience	
<input type="checkbox"/> Less than one year	Area(s) of experience:
<input checked="" type="checkbox"/> One to three years	Area(s) of experience: Supervision of professionals (e.g. RN, Social Worker)
<input type="checkbox"/> Three to five years	Area(s) of experience:
<input type="checkbox"/> Five or more years	Area(s) of experience:

**LICENSE/CERTIFICATION:**

What license(s), certification/certificate(s), registration(s), or other regulatory requirements/training:

Required: Valid WI drivers license and Wisconsin RN License in good standing

Preferred: Nurse Practitioner

Preferred: Bilingual

**J. ADDITIONAL COMMENTS**

Please list additional items not covered in this questionnaire that you feel would be helpful in understanding the job.

- Even temperament, flexibility, outstanding written and oral communication abilities, and strategic problem solving skills.
- Understanding of Electronic Health Records and HIPPA rules
- Knowledge of program evaluation and continuous improvement techniques and ability to analyze data or information and develop reports for distribution
- Strong organization and good time management and team building skills
- Ability to develop, implement and evaluate administrative procedures and operations.

**K. SIGNATURES:**

**SUPERVISOR'S/MANAGER'S CONFIRMATION:**

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I have completed and/or reviewed the contents of this job evaluation questionnaire and consent to its accuracy.

Supervisor/Manager Signature: *Eva Williams*

Date: 11/11/2013

Department/Division Head Signature: *Valerie R Wood*

Date: 11/29/2013

Email the completed form to: [HRCompensation@milwcnty.com](mailto:HRCompensation@milwcnty.com). Please ensure the subject line includes the request type and Department (High Org.) number. (I.e. 2013 STUDY 1140)

Received by Human Resources - Compensation Department  
Analyzed by Human Resources - Compensation Department

Initials:  
Initials:

Date:  
Date:



DEPARTMENT OF FAMILY CARE  
*Milwaukee County*

MARIA LEDGER, Director  
Maria.Ledger@milwaukeecounty.com

Phone: (414) 287-7600  
FAX: (414) 287-7704  
TTY: (414) 287-7601  
Toll Free: (877) 489-3814

Milwaukee County  
Family Care  
Governing Board

Maria Rodriguez  
Chairperson

E. B. Coleman

Joe Entwisle

Jeanne Fehr

Gwendolyn Jackson

Supervisor Willie Johnson, Jr.

Jung Kwak

Joanne Lipo Zovic

Paula K. Lorant

Mary McClintock

Supervisor Peggy A. Romo West

Mary Sawicki

Date August 4, 2015

To: Milwaukee County Civil Service Commission

From: Maria Ledger, Director, Department of Family Care

Subject: Request to Transfer a Position from the Classified Service to the Unclassified Service: Assistant Director - Quality

**Request**

The Department of Family Care requests that the newly created position of Assistant Director, Quality Director be changed to an unclassified service position.

**Background/ Analysis**

As the Managed Care Organization (MCO) transitions and grows in response to new State requirements, position responsibilities are being re-aligned with the future business needs of the organization. As such, the position of Quality Manager was reclassified to Assistant Director - Quality.

The Assistant Director - Quality has responsibility for the design and implementation of the MCO's Quality Management Program, including:

- Ongoing monitoring of MCO performance to ensure the delivery of long term care and acute and primary care services in accordance with Members' documented service requirements and requests;
- Identifying the need for further study or improvement relative to the provision of services;
- Designing and implementing quality and performance improvement projects to address areas of concern;
- Evaluating the effectiveness of improvement activities.
- Oversight of other staff in the Quality Division

As an Assistant Director, she is be required to oversee the work of the MCO's Best Practices Team Director, the Long Term Care Functional Screen Leads, the Quality Improvement Coordinators as well as serving as a liaison with our MCO's State DHS contract oversight specialist on matters concerning quality (e.g. the annual

external quality audit conducted by MetaStar). Additionally she works alongside our Medical Director and the Nursing Program – Director to shape the clinical and quality facets of the new Integrated Care model that is emerging.

The Assistant Director - Quality is a high level executive with primary responsibility for providing leadership and direction to other Managers in the Department and ensuring quality for over 8,400 members in eight (8) counties in Southeastern Wisconsin. The position serves as a member of the Department Senior Administrative staff.

This position, along with other new creates, exists because the Milwaukee County Department of Family Care is now required by the State of Wisconsin Department of Health Services (DHS) to become an Integrated Health Agency (IHA). To achieve this, the Department must successfully obtain a license from the State of Wisconsin Office of the Commissioner of Insurance (OCI) to function as a Health Maintenance Organization (HMO).

This position reports to the Department Director who in turn reports to the County Executive. This is a new position which must be adapted to meet the changing requirements of the State DHS, under whose contract the Department of Family Care functions.

A review of the duties and responsibilities for the position identified above indicates that the position qualifies for inclusion in the unclassified service as specified in Wisconsin State Statutes 63.03 (3)(a). I have attached a copy of the position description for the position in addition to the organizational chart for your reference.

Thank you for your consideration of this request. I will be available to answer any questions you may have.



DEPARTMENT OF FAMILY CARE

# Milwaukee County

MARIA LEDGER, Director  
Maria.Ledger@milwaukeecounty.com

Phone: (414) 287-7600  
FAX: (414) 287-7704  
TTY: (414) 287-7601  
Toll Free: (877) 489-3814

**Milwaukee County  
Family Care  
Governing Board**

**Maria Rodriguez**  
Chairperson

- E. B. Coleman
- Joe Entwisle
- Jeanne Fehr
- Gwendolyn Jackson
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- Evaluating the effectiveness of improvement activities.
- Oversighting other staff in the Quality Division

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external quality audit conducted by MetaStar). Additionally she works alongside our Medical Director and the Nursing Program – Director to shape the clinical and quality facets of the new Integrated Care model that is emerging.

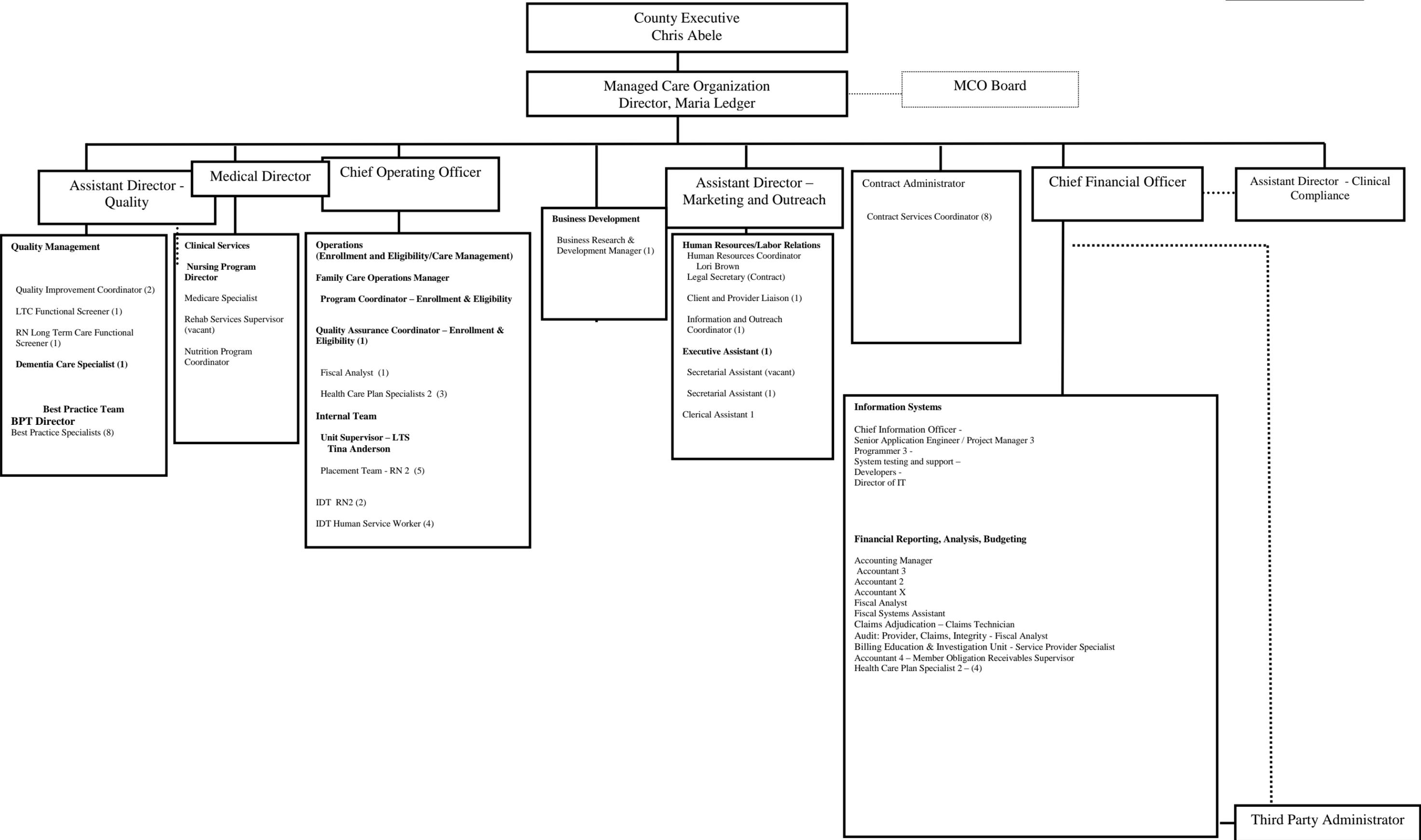
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Thank you for your consideration of this request. I will be available to answer any questions you may have.





## MILWAUKEE COUNTY JOB EVALUATION QUESTIONNAIRE

This form is designed to assist you in describing your departmental job. You are asked to fill this form out to outline the essential duties and responsibilities; and identify the knowledge, skills and abilities required to successfully perform the job. This form is used to request new job classifications, review current classifications, reclassification, reallocations, and general updates to the job description. **Note:** It is the job that is being evaluated, not the position/incumbent. Thank you for your cooperation.

**GENERAL INSTRUCTIONS:**

1. Before beginning, please look over the entire questionnaire. Each question should be answered completely and accurately. If a question does not apply to this job, please indicate "N/A" (Not Applicable).
2. To complete the questionnaire, please type and/or select your responses.
3. If you wish to make additional comments, please use the space available in the "Additional Comments" section on page 6 of this questionnaire.

**A. JOB IDENTIFICATION INFORMATION:**

<b>Department (High Org):</b>	FAMILY CARE (MCDFC)	<b>Division (Low Org):</b>	
<b>Contact for this Study</b>	Name: Maria Ledger	Email: MARIA.LEDGER@MILWAUKEECOUNTY.COM	
	Title: Director	Phone: 414-287-7610	
<b>Current Job Title:</b>	Quality Manager		
<b>Job Reports To:</b>	Title: Director		
<b>Request Type:</b>	<input type="checkbox"/> Establish New <input type="checkbox"/> Review <input checked="" type="checkbox"/> Reclassification <input type="checkbox"/> Reallocation <input type="checkbox"/> Update Description <input type="checkbox"/> Other, Specify		

**B. JUSTIFICATION STATEMENT:**

<b>1. Attach an organizational chart.</b>
<b>2. Explain the events or changes that made this request necessary.</b>
This position will have significantly greater responsibility moving forward. We therefore request to reclassify this position from Quality Manager to Assistant Director - Quality.

**C. ABOUT THE JOB:**

<b>Job Status:</b>	<input checked="" type="checkbox"/> Regular Full-Time	<input type="checkbox"/> Regular Part-Time	<input type="checkbox"/> Seasonal	<input type="checkbox"/> Contract
<b>Shift:</b>	<input checked="" type="checkbox"/> Day	<input type="checkbox"/> Evening	<input type="checkbox"/> Night	<input type="checkbox"/> Other:
<b>Hours Per Week:</b>	<input type="checkbox"/> >40 Hours	<input checked="" type="checkbox"/> 32-40 Hours	<input type="checkbox"/> 20-32 Hours	<input type="checkbox"/> <20 Hours
<b>Travel:</b>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No    If Yes, % Travel 5%			
<b>Will This Job Supervise/Manage?</b>	<input checked="" type="checkbox"/> Supervise <input checked="" type="checkbox"/> Manage		<input type="checkbox"/> N/A	# of Direct Reports: 5

**D. JOB SUMMARY:**

Briefly state, in several sentences, the principle purpose or function of the job. Respond by describing <b>What</b> the job is, <b>What</b> its major objective is, and <b>Why</b> does it exist.
The MCDFC Assistant Director - Quality will be responsible for leadership in the area of Quality Management for the entire MCO serving 8 counties and creating a new model of service as proscribed by the State of WI biennial budget..

E. ESSENTIAL DUTIES/RESPONSIBILITIES:

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**JOB RESPONSIBILITY LIST:** Please describe the major elements of the job. List only the major functions, separately, in order of importance. Provide a one or two line descriptive statement for each duty so that it can be understood by someone not familiar with this kind of work. Weight the approximate percentage of allocated work time for each functional work activity (Round to the nearest 5%). We do not need to know HOW the function is to be performed, but rather, WHAT it is to be performed. **Percentages should add up to 100%**

1.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Quality Management	% of Time: 25
	<i>Descriptive:</i> Effectively plans, organizes, implements, manages and evaluates the operation of the program to ensure compliance with the state contract and agency-developed quality improvement plans and objectives.		
2.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Supervision of Staff	% of Time: 20
	<i>Descriptive:</i> Supervises, directs and evaluates the performance of staff including unit managers. Sets clear goals and objectives, monitors progress toward goals and objectives, provides feedback and coaching, with formal review and recognizes performance improvement.		
3.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Quality Compliance	% of Time: 15
	<i>Descriptive:</i> Works with the CCO to identify, implement and maintain compliance with new internal and external standards and regulations (e.g. developing new guidelines or quality monitoring strategies)		
4.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Data Collection and Analysis	% of Time: 15
	<i>Descriptive:</i> Oversees the development of and coordinates the collection of data for analysis and reporting of a variety of clinical outcome measures and recommends best practices.		
5.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Program Liaison	% of Time: 10
	<i>Descriptive:</i> Represents the MCO at off-site meetings with the State of Wisconsin and/or external agencies as required to identify opportunities for collaboration around areas of mutual interest		
6.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Meeting coordination	% of Time: 10
	<i>Descriptive:</i> Agenda development, meeting date/time/place coordination, and post-meeting follow-up for one or more of the clinical and/or operational committees.		
7.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Other Duties as Assigned	% of Time: 5
	<i>Descriptive:</i>		
8.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		
9.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		
10.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		

**F. EQUIPMENT, TOOLS & MATERIALS**

Item 8.0

Please list all equipment, tools or materials required to perform the job along with the frequency.	Frequency			Type of Equipment
	Daily	Weekly	Monthly	
1. Machinery: (i.e. Vehicles, Motorized Equipment, Heavy Machinery, etc)		yes		car
2. Hand Tools/Instruments: (i.e. Power Tools, PC's, office or laboratory equipment, weapons, etc.)	yes			Personal Computer, Fax/Copier
3. Driving required?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

**G. JOB COMPETENCIES**

<b>Internal Contacts:</b> Please select all that apply.	
<input checked="" type="checkbox"/>	Contact with employees or others primarily at a routine level involving basic information exchange.
<input checked="" type="checkbox"/>	Contact with peers and others involving explanation of information (these contacts may be within or outside department or division), and the gathering of factual information. May include the communication of sensitive or confidential information.
<input checked="" type="checkbox"/>	Contact across departments or divisions with employees involving persuasion of others, absent formal authority, to conform to a policy interpretation or recommended course of action.
<input checked="" type="checkbox"/>	Contact that requires a high degree of authority in securing understanding and cooperation of multiple departments or interests.

<b>External Contacts:</b> Please select all that apply.	
<input type="checkbox"/>	No contact with people outside the organization.
<input type="checkbox"/>	Limited external contact to: gather information, answer queries, or ask assistance.
<input checked="" type="checkbox"/>	Frequent external contact to: gather information, answer queries, or ask assistance.
<input checked="" type="checkbox"/>	External contact involving a requirement to maintain a continuing external working relationship with individuals, or organizations.
<input checked="" type="checkbox"/>	External contact involving the initiation and maintenance of relationships that can have a significant effect on the success of the organization.

<b>Communication Skills:</b> Select the level of language (ability to read, write and speak needed to successfully accomplish the essential duties of the job.) Please select all that apply.	
<input type="checkbox"/>	Read, write and comprehend simple instructions, short correspondence and memos.
<input type="checkbox"/>	Read and interpret safety rules, operating/maintenance instructions and procedure manuals.
<input checked="" type="checkbox"/>	Write routine reports, correspondence, and speak effectively before both internal and external groups.
<input checked="" type="checkbox"/>	Read, analyze, and interpret business manuals, technical procedures and/or government regulations.
<input checked="" type="checkbox"/>	Read, analyze, and interpret scientific and technical journals, financial reports and legal documents.
<input checked="" type="checkbox"/>	Prepare and/or present written communications that pertain to controversial and complex topics.

<b>Decision-Making:</b> Please select <u>only one</u> of the following:	
<input type="checkbox"/>	Requires minimal decision-making responsibility.
<input type="checkbox"/>	Regularly makes decisions involving how a project or operation will be conducted (i.e. sequence or method), and generally from an available set of alternatives or precedents.
<input type="checkbox"/>	Regularly makes decisions of responsibility, involving evaluation of information. Decisions may require development or application of alternatives or precedents.
<input type="checkbox"/>	Regularly makes significant decisions and final results, typically affecting the entire department. Available guides or precedents are limited. Has authority over the allocation of resources.
<input type="checkbox"/>	Significant responsibility for decisions and final results, affecting more than one department or a department with multiple units. Substantial analysis is required and many factors must be weighed before a decision can be reached.
<input checked="" type="checkbox"/>	Major responsibility for decisions and final recommendation, which may result in the formulation of strategic plans of action to achieve the broad objectives for the organization.
<input type="checkbox"/>	Primary work responsibility involves the long-range future including the scope, direction and goals of the organization.

<b>Complexity, Judgment and Problem Solving:</b> Please select all that apply. <span style="float: right;">Item 8.0</span>	
<input type="checkbox"/>	Work of a relatively routine nature. Requires the ability to understand and follow instructions.
<input type="checkbox"/>	Structured work, following a limited variety of standard practices.
<input type="checkbox"/>	Generally structured work, but involving a choice of action within limits of standard policy and procedures.
<input checked="" type="checkbox"/>	Generally diversified and moderately difficult work. Requires judgment in the adaptation and interpretation of established practices and procedures to meet problems and situations to which the application is not clearly defined.
<input checked="" type="checkbox"/>	Typically difficult or complex work. Generally governed by broad instructions and objectives usually involving frequently changing conditions and problems.
<input checked="" type="checkbox"/>	Work requires the ability to plan and perform work in light of new or constantly changing problems, work from broad instruction, and deal with complex factors not easily evaluated. Decisions require considerable judgment, initiative, and ingenuity in areas there is little precedent.
<input checked="" type="checkbox"/>	Work requires the ability to act independently in the formulation and administration of policies and programs for major departments or functions.

<b>Supervisory/Managerial:</b> If applicable, select the appropriate level of responsibility.	
<input type="checkbox"/>	<b>Level 1</b> General instructing, scheduling, and reviewing the work of others performing the same or directly related work. Acts as "lead worker". Functional supervision only.
<input type="checkbox"/>	<b>Level 2</b> Recommends personnel actions (hiring, termination, pay changes). Involves scheduling, supervision, and evaluation of work of employees who perform similar work assignments.
<input type="checkbox"/>	<b>Level 3</b> Scheduling, supervision, and evaluation of work as a "manager" of the first line supervisors; or perform supervision of workers who perform distinct and separate blocks of work.
<input checked="" type="checkbox"/>	<b>Level 4</b> Scheduling, supervision, and evaluation of work as a superior of "managers". Administers through subordinate managers, departmental multi-function programs or operations.
<input type="checkbox"/>	<b>Level 5</b> Scheduling, supervision, and evaluation of work as a superior of those in level 4.

<b>List the names of the Department(s)/Division(s) supervised/managed by this job:</b>	
<ul style="list-style-type: none"> <li>Quality Assurance (e.g. Quality Improvement Coordinators, Long Term Care Functional Screen Leads, Behavioral Health Specialist; Best Practice Team Director)</li> </ul>	

Are there subordinate supervisors/managers reporting to this job?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	If yes, how many? 1-3
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<b>Fiscal Responsibility:</b>		
Responsible for annual operating budget for department(s)/division(s)?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	If yes, please provide total amount? 200K

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H. WORKING CONDITIONS

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What are the physical, mental and environment demands for this job? Functions identified must coincide with the descriptive statement of essential duties and responsibilities for this job. The functions should focus on what is to be done and the processes traditionally used to achieve end results. For each of the following functional requirements, indicate the frequency in which it occurs in this job.

<b>PHYSICAL DEMANDS</b>		<b>N/A</b>	<b>Seldom (&lt;25%)</b>	<b>Occasional (25% - 50%)</b>	<b>Frequent (50% - 75%)</b>	<b>Always (&gt;75%)</b>
Standing		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Walking/Running		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sitting		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reaching		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Climbing		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bending/Kneeling		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hearing		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Talking		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Visual		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Typing		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Fine Dexterity		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manual Dexterity		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upper Extremity Repetitive Motion		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting/Carrying	10 lbs.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pushing/Pulling	10 lbs.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>NON-PHYSICAL DEMANDS</b>		<b>N/A</b>	<b>Seldom (&lt;25%)</b>	<b>Occasional (25% - 50%)</b>	<b>Frequent (50% - 75%)</b>	<b>Always (&gt;75%)</b>
Analysis/Reasoning		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Communication/Interpretation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Math/Mental Computation		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reading		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sustained Mental Activity (i.e. auditing, problem solving, grant writing, composing reports)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Writing		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other:		<input type="checkbox"/>				
<b>ENVIRONMENTAL DEMANDS</b>		<b>N/A</b>	<b>Seldom (&lt;25%)</b>	<b>Occasional (25% - 50%)</b>	<b>Frequent (50% - 75%)</b>	<b>Always (&gt;75%)</b>
Work Alone		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Frequent Task Changes		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tedious/Exacting Work		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
High Volume Public Contact		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dust		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Temperature Extremes		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loud Noises		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Danger		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toxic Substances (i.e. solvents, pesticides, etc.)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:		<input type="checkbox"/>				

<b>WORK SCHEDULE:</b> Please select all that apply.	
<input checked="" type="checkbox"/>	Routine shift hours. Infrequent overtime, weekend, or shift rotation.
<input type="checkbox"/>	Considerable irregularity of hours due to frequent overtime, weekend or shift rotation.
<input type="checkbox"/>	Regular and/or frequent on-call availability.
<input type="checkbox"/>	Nature of work frequently requires irregular, unpredictable or particularly long hours. (I.e. covering double shifts, etc.)

<b>DEMANDS/DEADLINES:</b> Please select all that apply. <span style="float: right;">Item 8.0</span>	
<input type="checkbox"/>	Little or no stress created by work, employees, or public.
<input checked="" type="checkbox"/>	Occasional stress due to deadlines or workload because of intermittent or cyclical work pressures, or occasional exposure to distressed individuals within the immediate work environment.
<input checked="" type="checkbox"/>	High volume and variable work demands and deadlines impose strain on routine basis or considerable stress intermittently; OR regular direct contacts with distressed individuals within the immediate work environment; and/or exposure to demands and pressures from persons other than immediate supervisor.
<input type="checkbox"/>	Work requires frequent, substantive contacts with people in highly stressful situations; delicacy and unpredictability of contacts routinely creates considerable strain or heavy stress regularly.

**I. EDUCATION, EXPERIENCE AND LICENSE**

<b>EDUCATION</b>	
Please indicate the MINIMUM educational level required:	
<input type="checkbox"/>	HS Diploma/GED
<input type="checkbox"/>	Associate's Degree
<input type="checkbox"/>	Bachelor's Degree
<input type="checkbox"/>	Graduate Degree
<input checked="" type="checkbox"/>	Post Graduate Degree (PhD)
<input type="checkbox"/>	Professional Degree (Law, Medicine, etc.)
<input checked="" type="checkbox"/>	Other:

Area of specialization/major:	
Area of specialization/major:	
Area of specialization/major:	
Area of specialization/major:	Behavioral or Health Sciences
Area of specialization/major:	
Please indicate: CPHQ certification preferred	

<b>WORK EXPERIENCE</b>	
Please indicate the MINIMUM number of years of practical experience required.	
<input type="checkbox"/>	No experience
<input type="checkbox"/>	Less than one year
<input type="checkbox"/>	One to three years
<input checked="" type="checkbox"/>	Three to five years
<input type="checkbox"/>	Five or more years

Area(s) of experience:	
Area(s) of experience:	
Area(s) of experience:	experience working within a managed long-term care program
Area(s) of experience:	

<b>SUPERVISORY/MANAGEMENT EXPERIENCE</b>	
Please indicate the MINIMUM number of years of supervisory/management experience required.	
<input type="checkbox"/>	No experience
<input type="checkbox"/>	Less than one year
<input type="checkbox"/>	One to three years
<input checked="" type="checkbox"/>	Three to five years
<input type="checkbox"/>	Five or more years

Area(s) of experience:	
Area(s) of experience:	
Area(s) of experience:	Supervision of professionals and managers
Area(s) of experience:	

<b>LICENSE/CERTIFICATION:</b>
What license(s), certification/certificate(s), registration(s), or other regulatory requirements/training:
valid drivers license

**J. ADDITIONAL COMMENTS**

Please list additional items not covered in this questionnaire that you feel would be helpful in understanding the job.	
<ul style="list-style-type: none"> <li>• Even temperament, flexibility, outstanding written and oral communication abilities, and strategic problem solving skills.</li> <li>• Understanding of Electronic Health Records and HIPPA rules</li> <li>• Strong organization and good time management skills</li> <li>• Knowledge of research and program evaluation practices, principles, and methods</li> <li>• Proven team building ability</li> <li>• Strong analytic reasoning ability</li> </ul>	

**K. SIGNATURES:**

**SUPERVISOR'S/MANAGER'S CONFIRMATION:**

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I have completed and/or reviewed the contents of this job evaluation questionnaire and consent to its accuracy.

Supervisor/Manager Signature: *Maria Ledger*

Date: 8/1/2015

Department/Division Head Signature: *Maria Ledger*

Date: 8/1/2015

Email the completed form to: [HRCompensation@milwcnty.com](mailto:HRCompensation@milwcnty.com). Please ensure the subject line includes the request type and Department (High Org.) number. (I.e. 2013 STUDY 1140)

Received by Human Resources - Compensation Department  
Analyzed by Human Resources - Compensation Department

Initials:  
Initials:

Date:  
Date: