

MILWAUKEE COUNTY
Inter-Office Memorandum

DATE: June 15, 2012

TO: Chairwoman Marina Dimitrijevic, County Board of Supervisors

FROM: Veronica W. Robinson, Executive Secretary/Director
Personnel Review Board/Ethics Board

RE: Abolish Administrative Intern - NR (Title Code #00087700);
Create Clerical Specialist PRB – NR (Title Code #XXXXX)

REQUEST

In accordance with C.G.O. 17.05(1)(a) and 1.17(b), I hereby respectfully submit a request to abolish the Personnel Review Board (“PRB”) and the Ethics Board Administrative Intern (PR 01IM) position and to create a position of Clerical Specialist PRB – NR (PR 05PM). This transaction will result in a zero net jobs change in the number of positions authorized in the 2012 adopted annual budgets of the PRB and Ethics Board and is expected to have a relatively modest – if any – fiscal impact. This change is requested with the intent of ensuring that the position is appropriately classified based upon the duties assigned to and performed by the incumbent of the position. I also respectfully ask that you refer this request to the Finance, Personnel, and Audit Committee for consideration at its July 19, 2012 meeting.

This request includes information with respect to the reason for the change as well as the qualifications, duties, title and compensation expected. Copies of the position description in the format designated by Human Resources and the Request for Corrective Position Action approved by Administrative Services are attached.

PURPOSE

Under the general direction of the PRB Executive Secretary, who is also the Executive Director of the Ethics Board¹, (“Secretary Director”) the Administrative Intern processes the majority of the PRB cases from start to finish; performs departmental accounting and purchasing duties; assists with preparation and management of bi-weekly PRB meetings; and completes many other duties as assigned, including modest duties that support the Ethics Board¹.

BACKGROUND

The position of Administrative Intern (PR 01IM) was created in the PRB department in 2008. Initially, the .5 FTE hourly position was established for the purpose of assisting with special PRB and Ethics Board projects and completion of simple clerical tasks, such as filing and data entry. However, in the 2010 adopted budget the Administrative Intern position was adjusted to

¹ Personnel Review Board staff use a minimum of 25% of their time on Ethics Board activities, annually.

1.0 FTE. This action was justified by ongoing historical up-trends in PRB case volume, as well as expanded Ethics Board activities resulting in part from modifications to the Ethics Code.

The Administrative Intern position, which has been continuously filled by the same incumbent since June 2010, reports directly to the Secretary Director and coordinates PRB work with the Administrative Assistant. However, in the absence of the Secretary Director, the Administrative Intern has a quasi-reporting relationship to the department's Administrative Assistant.

DETAIL

- **Duties**

Initially, the thrust of the Administrative Intern position was basic clerical support with limited duties that required moderate discretion, judgment or initiative. The position served as support to and was largely under the direction of the Administrative Assistant. However, as the workload of the Personnel Review Board continued to increase, the Administrative Intern position was gradually adjusted to include all aspects of PRB case management, including opening, updating, and closing PRB case files; preparation of case statistical reports; timely preparation of standard and non-standard correspondence to interested parties; case status monitoring; and retrieval and compilation of case record data for use by the Secretary Director. The Administrative Intern also receives and posts both draft and approved minutes from the PRB Secretary Director; maintains and updates the PRB calendar, docket book, and case profile papers; organizes and retrieves electronic or paper PRB files; prepares case files for circuit court review; enters alphanumeric data for statistical reporting purposes of the Secretary Director; timely posts PRB agendas and meeting notices; and updates the PRB website and bulletin board. The Administrative Intern regularly attends both open and closed sessions of biweekly PRB meetings and quarterly or periodic Ethics Board meetings, preparing and setting up the meeting room and arranging meeting materials for PRB hearings and monitoring recording equipment. This is by no means a complete list of all of the duties of the Administrative Intern.

The Administrative Intern position serves as back up to the Administrative Assistant, fulfilling basic duties pertaining to the Ethics Board, such as answering, receiving, recording, and distributing Statement of Economic Interests ("SEI") forms – also known as "financial disclosure" forms; answering basic questions regarding mandatory SEI form filing requirements; performing notarial acts; and completing irregularly assigned duties related to ethics education and training activities. The Administrative Intern is sufficiently trained to answer general questions about the Ethics Board and the Ethics Code; to assist individuals in navigating the Ethics Board website; and to recognize when ethics inquiries and complaints require direct, timely, and confidential referral to the Secretary Director. In the absence of the Administrative Assistant, the Administrative Intern prepares the room and materials for Ethics Board meetings. The Administrative Intern performs other ethics-related duties as requested or assigned.

The full staff of the PRB and Ethics Board consists of 3.0 FTE, so the Administrative Intern also completes purchasing and accounting activities under the direction of the Secretary Director. The Administrative Intern must also be cross-trained on a significant majority of basic duties of

the Administrative Assistant; although the preponderance of the Administrative Intern's work is related to PRB case management.

- **Requirements**

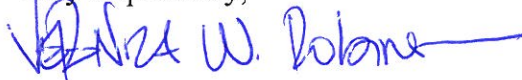
The Administrative Intern performs complex work and must demonstrate strong organizational skill; substantial administrative and computer skills; investigative, analytical thinking skill; discretion; independent judgment; initiative; focus; and extreme attention to detail. The Administrative Intern requires knowledge of State and local laws – especially Milwaukee County ordinances and Wisconsin State statutes that govern employee suspension and termination proceedings – and must apply that knowledge to the specifics of each case. The Administrative Intern timely and accurately completes segments of PRB case management with generally limited direction and, so, must have a sense of what actions or omissions in PRB case management could be grounds for unfavorable dismissals, reversals, or lawsuits. The Administrative Assistant must be confident about what to do to assist in the prevention of those actions or omissions, making proper assessments to determine if a PRB matter requires referral to the Secretary Director.

Possessing specialized knowledge in programmatic and fiscal areas and at least a fundamental understanding of administrative hearing procedure; Robert's Rules of Order; basic principles of the ADA and the FMLA; familiarity with the language of union contracts; and reasonable comfort with the Milwaukee County Ethics Code, the Administrative Intern uses various means of communication and basic, appropriate legal or technical language to effectively inform, direct, or instruct employees, supervisors and managers, appointed and elected officials, union representatives, internal and external attorneys and county constituents.

- **Conclusion**

I believe the information provided herein and the attached position description will be sufficient to support my concern that the Administrative Intern position is not properly classified. Therefore, I again ask that you consider this request to create parity with other county positions that require similar training, education and experience. It is my understanding that the best approach to this matter is to abolish the Administrative Intern position and creating a new position. I believe a position of Clerical Specialist – PRB (NR) may be warranted. I also respectfully ask that you refer my request to the Finance, Personnel and Audit Committee for consideration at the July 19, 2012 meeting.

Very respectfully,



CC: Kerry Mitchell, Director, Department of Human Resources
Pat Farley, Director, Department of Administrative Services
Personnel Review Board
Ethics Board

Attachments

MILWAUKEE COUNTY PERSONNEL REVIEW BOARD
POSITION DESCRIPTION

OFFICIAL TITLE OF POSITION: Clerical Specialist PRB

NAME OF PRESENT INCUMBENT: Marvic Rizio

DEPARTMENT: Personnel Review Board

DIVISION: Personnel Review Board

REPORTS TO (Name & Title): Veronica W. Robinson, Executive Secretary

TITLE CODE: XXXXX **POSITION NUMBER:** XXX **PAY RANGE:** 5PM

PURPOSE OF POSITION:

The Clerical Specialist PRB works under the general direction of the PRB Department Administrator. The complex work of the Clerical Specialist PRB is specific to the Personnel Review Board and requires keen attention to detail. The Clerical Specialist PRB performs critical tasks in a high volume department with a varied workload and daily handles personnel matters of a confidential nature regarding employees and officials at all levels of county service. After analyzing forms and documents unique to the PRB, the Clerical Specialist must independently determine how to process them.

The Clerical Specialist PRB directly supports the Personnel Review Board by preparing for, setting up, and breaking down PRB meetings, ensuring that all meeting materials are in place so that meetings are run smoothly. Due to the size of the PRB staff, the Clerical Specialist PRB must also complete purchasing duties and manages accounts receivable and payable documents forwarded from the Department Administrator.

The Clerical Specialist PRB must know, understand, and, where applicable, apply the rules of the Milwaukee County Ethics Code and the Personnel Review Board, Milwaukee County Civil Service Rules; several Milwaukee County Ordinances, especially Chapters 9, 14, 17, and 33; various sections of the Milwaukee County Administrative Code; over thirteen Wisconsin State Statutes, but especially Chapters 19, 59, and 63; and be familiar with various Federal employment laws, including FMLA, FLSA, and ADA.

The Clerical Specialist PRB must be able to independently and accurately explain the rules, policies and procedures of both the Personnel Review Board and the Ethics Board and to provide direction or resolve the concerns of county employees, county elected and appointed officials, attorneys, union representatives, and constituents.

The Clerical Specialist PRB may be assigned other work on an "as needed" basis and is expected to use well-developed judgment and to display a deep understanding of the primary purpose of both the Personnel Review Board and the Ethics Board, in order to determine how best to organize, prioritize, and approach work assignments, including non-standard duties that are given to the Clerical Specialist PRB by the Department Administrator on a regular basis.

The Clerical Specialist PRB must be sufficiently trained and knowledgeable to provide support to the Department Administrator in the absence of the department Administrative Assistant. The Department Administrator may use the Clerical Specialist PRB up to 25% of the time for matters related to the Ethics Board.

POSITION(S) SUPERVISED: (must include disciplining and evaluating): N/A

DUTIES: Describe in detail the work you do, listing most time consuming duties first, along with approximate percentages which should total 100%. Indicate "E" if duty is essential.

Description of Duties	Time Spent on Duty	E=Essential Duty
Act as primary recipient of PRB cases and perform all duties associated with case management, including preparation of legal notices/service; docket; calendar; preparation of case statistics and monitoring systems; and case follow-up activities on settlements, re-evaluations, items on the call of the chair; create, copy, or modify various communications and correspondence letters; contact or follow-up with employees, HR staff, attorneys, union reps, and other interested persons regarding the status of PRB cases; and provide status updates or reports to the Department Administrator.	65%	E
Notice and set up all hearings and meetings of both the PRB and the Ethics Board, in accordance with any necessary provisions of Wisconsin State law and M.C.G.O., Chapter 33, Chapter 17.207, and Chapter 9 and its by-laws.	10%	E
On an ongoing basis and for new employees or Board members, train on or answer questions about rules, policies, and procedures specifically related to PRB case processing; use judgment in determining what constitutes higher level problems or questions that should be referred to the Department Administrator; answer basic questions about Ethics complaint procedures.	10%	E
Stock, monitor and purchase office supplies and services for the PRB and the Ethics Board, after approval by the Department Administrator; complete various types of purchase orders; receive and track invoices; troubleshoot equipment or make arrangements for equipment repairs.	5%	E
Assist with the receipt, monitoring, and filing of Ethics financial disclosure forms and other Ethics-related duties, as assigned.	3%	E
Copying, filing (hard copy and electronic), and organizing PRB files for future use and easy access; assist with Ethics documents management upon request.	2%	E
At the request of the Department Administrator, research personnel issues, ordinances, agreements and prior decisions of the Board and give oral or written summary of research findings specific to the Department Administrator's request.	2%	
Recommend and sometimes implement system processing improvements and modifications to assure efficiency.	2%	
Maintain training knowledge beyond normal duties in order to provide basic back-up to the Administrative Assistant regarding PRB and/or Ethics duties.	1%	

KNOWLEDGES, SKILLS & ABILITIES: Indicate a corresponding knowledge, skill and/or ability required for each of the above indicated duties.

KNOWLEDGE

- Knowledge of legal principles and practices, including familiarity with legal terminology.
- Knowledge of hearing administration; familiarity with rules of administrative law procedure in a quasi-judicial setting preferred; knowledge of Robert's Rules of Order preferred.
- Knowledge of open records law and open meetings law.
- Knowledge of Microsoft Office 2010, including Excel, Word, PowerPoint, and Publisher; familiarity with Adobe Acrobat Pro 9; AMS Advantage 2000, v2.1; CMS Titan v5.3; Lotus Notes v8.5; and Camtasia Studio 7, and Hyland Unity Client v.11.0.1.9, preferred.
- Knowledge of, including, purchasing and accounting procedures; knowledge of accounting principles preferred.
- Knowledge and understanding of local, state, and federal legislative process preferred, including Milwaukee County administrative procedures; civil service systems; circuit court appeal process; and Sheriff's process services.

SKILLS

- Demonstrated time management, organization, coordinating, and prioritizing skills.
- Excellent problem-solving skills and conflict-resolution skills.
- Strong oral, written, and interpersonal communication skills.
- Soft skills sufficient to firmly, but tactfully and pleasantly, deny requests for confidential information (information not open to public record).
- Solid basic math, grammar, and spelling skills.

ABILITIES

- Ability to touch type with speed and accuracy.
- Ability to maintain confidentiality of information.
- Ability to analyze complex legal and procedural issues and to make application of legal principles.
- Ability to make clear and logical verbal and written presentations.
- Ability to quickly adapt to changing environment and to learn and implement new tasks within established timeframes.
- Able to exercise high degree of initiative, discretion, and discernment.

MINIMUM QUALIFICATIONS:

EDUCATION:

Candidate must have a high school diploma or GED equivalent, as well as three (3) years of significant experience working. Some supervisory or management experience is desirable. Two years of experience in a business clerical or business office environment is required if the applicant is applying in a department or area in which the applicant has previously worked.

EXPERIENCE:

Public administration, courts, or legal environment preferred. Experience with employment law, personnel, labor relations, and/or with quasi-judicial proceedings, preferred.

LICENSURE/CERTIFICATION/REGISTRATION:

Notary Public, preferred

PHYSICAL REQUIREMENTS/DEMANDS:

Pushing/pulling cart containing 50-80 lbs. of materials; bend at knees to properly lift crates weighing 25-35lbs; reach up approximately 5' to file in top drawer or bin of filing cabinets; stoop down to file in bottom drawer or bin of filing cabinets; quickly walk for several thousand feet; sit for extended periods of time; carry up to 15lbs of materials; climb flights of stairs; step up onto step stool.

WORK ENVIRONMENT:

Generally a high pressure, high volume work environment requiring constant multi-tasking, including typing, speaking, answering phones, responding to door bell, receiving guests and unexpected visitors, and updating calendars, and handling emails. Extensive contact with Corporation Counsel's Office, union officials, private attorneys, human resources coordinators and/or managers, and elected and appointed officials, including members of boards and commissions. Handle calls from angry or distraught constituents and employees or from media sources. Periodically alone in the office and must be able to work in a self-directed manner. When distractions are present in connecting offices, must be able to work in a self-focused manner. Locked environment requires regular, close association with co-workers and manager.

INCUMBENT'S SIGNATURE: Harold B. Rizio Date: 6/13/12

SUPERVISOR'S SIGNATURE: Denise W. Robana Date: 6/13/12

DEPARTMENT HEAD'S SIGNATURE: Denise W. Robana Date: 6/13/12

12 PA 0208

Enter Budget Fiscal Year Below

2012

County of Milwaukee

Request for Position Action Form 3700 R2

DAS Area

Analyst

Dan Laurila

Corrective Action Plan

Dept Name	Agency	Org Code	Date of Request
PRB	112	1120	4/20/2012

Control Number	Tran Code	Tran Agcy	Tran Number
	PA	112	112004201209

Position Action

Initial Cert Request Reclassification Temp Appoint Abolish/Create TAHC TAHC form should be attached

Modify Cert Request Reallocation Emerg Appoint Double Fill Other

Describe Other:

Request Detail

Line No.	Clock No	Position No.	Name (Last, First, Middle/Initial)	Hours/Type	Amount	DAS Approved
01	144003	00867700000006	Rico, Marvic	FIT	\$23,215	
02						
03	Abolish	00087700000006	Adm Intern	Intern	-10495	
04						
05	Create		Clerical Spec WR/PRO/Ethics	FIT	28295	

Description of Position Action Being Requested

Requesting to reclassify Administrative Intern position to Clerical Specialist (Confidential) - PRB/Ethics. The position requires specialized skills, knowledge, and/or abilities of a topical, legal, or technical nature. The expected cost of the position action for the remainder of the year is based on ultimately hiring someone into the position at step one of the pay range. If reclassification is not appropriate action because the position is vacant, then please consider an abolish/create action instead.

Justification for Exemption

This is a critical position in the department of the Personnel Review Board. The individual filling the position requires specialized knowledge and performs work beyond the scope of an Administrative Intern. The position does not appear to be appropriately classified for the duties and the extent of responsibilities required of the position. Fiscal impact is negative because the position currently requires the incumbent to forfeit pay when absent and the incumbent will only be working 0-4 hours per day from 4/10/12 through 05/11/12 (approved short term leave). The position was budgeted for 2012 as a full-time hourly position with no periods of time off, but the incumbent has taken occasional unpaid VTO.

Public Safety, Patient Care, Public Health (Y or N)

Grant Reimbursable (Y or N)

Approval Needed in CRS (Ceridian Recruiting System) (Y or N)

Net Amount Of Request \$23,215

Requested By Veronica W. Robinson

Phone Number 414.278.5293

Department Head *Veronica W. Robinson*

Location CH Suite 212

Department of Human Resources (Required for TAHC Only)

Approved Denied

Authorized Signature _____ Date _____

Department of Administrative Services (Only)

Comments:

Per HR, this should be an abolish/create. The Admin. Intern position will be abolished upon the filling of Clerical Spec. position. The approved amount assumes the new position is filled for 12 pay periods.

Budget Analyst

Approved By: *[Signature]*

Date: 5/17/2012

\$ 17,800

Denied By: _____

Date: _____

Total Approved

Director of Administrative Services

Authorized Signature *[Signature]* Date 5/20

Approved Denied