

TO: Personnel Board
FROM: Victoria Larson, Human Resources
DATE: October 28, 2021
SUBJECT: Deputy City Clerk and Municipal Clerk Series

At the request of City Clerk, Maribeth Witzel-Behl, I studied the positions of Deputy City Clerk, currently classified as Administrative Supervisor (CG 18, Range 3, Position #4651), currently occupied by James Verbick. I also studied the Municipal Clerk 1 -2 series (CG 20, R 9-10), and the Certified Municipal Clerk (CG 20, R 11), currently occupied by Eric Christianson (Position #708), Thomas Lund (Position #4047), Nikki Perez (Position #714), Jennifer Haar (Position #743), Heather Harris (Position #711), Maggie McClain (Position #735), Shelby Hanewold (Position #4466), and Bonnie Chang (Position #4793.) J. Verbick's position initially was responsible for alcohol licensing, but overtime has evolved to include a larger scope of election responsibilities. Additionally, due to the growing complexity of elections this position has added supervision responsibilities as well. Duties for the Municipal Clerk Series have also become more complex due to the increase in legalities surrounding elections, the evolution of voting methods, the addition of polling locations, increase in staff size for election officials, and increase alcohol licensing options. Based on my review of the current position descriptions, existing classifications as well as discussions with M. Witzel-Behl, J. Verbick, Municipal Clerk staff, and other City staff I conclude the following:

- The new classification of Deputy City Clerk, J. Verbick should be created in CG 18, R 7, that position #4651 be recreated in the new range, and the incumbent be reallocated to the new position.
- The Municipal Clerk 1 classification is appropriately classified and should remain CG 20, R 9.
- The Municipal Clerk 2 classification be recreated in CG 20, R 11, that position #s 711 (Heather Harris), 735 (Maggie McClain), 4466 (Shelby Hanewold), 4793 (Bonnie Chang) be recreated in the new range and the incumbents be reallocated to the new positions.
- The Certified Municipal Clerk classification be recreated in CG 20, R 13, the position #s 708 (Eric Christianson), 4047 (Thomas Lund), 714 (Nikki Perez), and 743 (Jennifer Haar) be recreated in the new range and the incumbents be reallocated to the new positions.

The Deputy City Clerk position was created in the 2016 budget after a decision was made to remove the Alcohol Coordinator position. This position was filled in 2017 with the primary responsibilities overseeing alcohol licensing, helping individuals understanding the licensing process, and staffing the Alcohol License Review Committee (ALRC.) Over time the duties surrounding alcohol licensing has become more complex due to the creativity of business owners. Breweries, distilleries, mead establishments and other creative alcohol businesses have expanded in Madison over the last 10 years. Also due to COVID, rules surrounding cocktails-to-go and online orders of alcohol at grocery stores has changed. J. Verbick keeps abreast of these changes, sometimes makes ordinance recommendations to the ALRC, and confers with the City Attorney's Office and ALRC attorney. J. Verbick has worked to improve the alcohol licensing program by developing an applicant tracking process and by creating boiler plate language to ensure applicants understand where they are at in the process.

J. Verbick has also taken on additional responsibilities related to elections. J. Verbick initially only spent 5 percent of time a couple times a year on election administrative tasks. Election administration now accounts for 40 percent of J. Verbick's worktime. Election laws have become more complex over the last several years. This has required all Clerk's Office staff to adapt quickly to the changing legal landscape and lengthened the time spent on elections. The Clerk's office has worked to respond to these changes and to ensure voter access by conducting more voter outreach in advance of the elections, by adding voting at libraries, adding early in person voting, allowing for drive up voting in some locations, and through events like Democracy in the Park. Such modifications to voting access have increased the methods to vote (such as early in person voting), and increased the number of polling locations; which in turn has increased the amount of election staff. During election season the Clerk's Office has approximately 6,000 election officials in the election work pool, 3,000 of those are scheduled to work during an election. 150 of the 3,000 are Chief Inspectors with the rest being paid volunteers. An additional 60 individuals are hired as hourly employees to assist with the election. The Clerk's Office manages approximately 4 elections per year with federal elections typically being the largest in scope. J. Verbick took on a supervisor role with the increased amount of election officials. J. Verbick leads the hiring process for Absentee Voting Clerks, terminates inspectors as needed, handles polling site complaints from voting observers of election processes, and provides coaching to election officials as needed. For the past two years, J. Verbick has also taken on the responsibility of managing the City's polling locations. This requires a great degree of community outreach and diplomacy to coordinate with the school districts, UW-Madison, other polling locations, residents, and alders. J. Verbick has successfully secured new polling locations and addressing current polling locations concerns through continued community relationship building.

For the purpose of this study, I reviewed the classifications of CG18, R 7 through CG18, R 11. When reviewing J. Verbick's proposed reclassification request to CG 18, R11 which include positions such as the City Forester and Customer Service Supervisor at the Water Utility, I noticed significant differences in comparison to the Deputy City Clerk's position. These positions have much more extensive supervision duties of wide variety of full-time staff and hourly staff year around. The greater supervision responsibility requires these positions to have three years of supervision experience in order to minimally qualify for the position. Both the City Forester and the Customer Service Supervisor require three years of advanced level administrative and supervisory experience. J. Verbick's current position is currently classified as an Administrative Supervisor, which generally requires at least one year of supervision and/or leadership experience.

Additionally, I reviewed the classifications in CG 18, R7 and found more comparable positions to the Deputy City Clerk position. Specifically, the Police Court Services Supervisor classification requires supervision with permanent staff year around, it is a considerably smaller team of various administrative positions. As stated earlier, there are over 3,000 election officials during election season which is the largest seasonal staff capacity in the City. Given the cyclical nature of elections, there is a constant need and continuous cycle to hire, train, and onboard election officials. Both comparable positions have oversight over the development, maintenance, and implementation of unit processes. J. Verbick has expanded in his alcohol licensing responsibilities with recommendations and improvements to further development of the program. J. Verbrick also directly collaborates with the City Attorney's Office, ALRC members, with the University and high school officials in order provide oversight of the alcohol licensing process and coordinate locations during election season. J. Verbrick has demonstrated leadership and conducts work with a high

degree of initiative, knowledge, and independence. Also J. Verbick's position description outlines the expectation that a position of this level requires thorough knowledge of office procedures and practices, in addition to working knowledge of related local, state, and federal laws related to the functions of a Clerk's Office, the election process, and alcohol licensing. I would further recommend the creation of a separate classification of Deputy City Clerk. While I find the level of complexity and responsibility of this position similar to other positions in CG 18, R7, I do not find that the other existing classifications adequately describe this position.

As part of this study I also reviewed the Municipal Clerk 1, 2, and Certified Municipal Clerk classifications. Currently the Clerk's Office has four (4) Certified Municipal Clerks and four (4) Municipal Clerk 2 positions. Employees begin in the Municipal Clerk 1 classification and progress through the series as they master positional tasks; eventually reaching the Certified Municipal Clerk level upon becoming a Wisconsin Certified Municipal Clerk. This entails completing 100 hours of training through UW-Green Bay and passing a certification test. There are also requirements for additional training through the Wisconsin Elections Commission. Through my discussions with M. Witzel-Behl and the Municipal Clerks, the changing landscape of elections greatly impacted the duties of the Clerk's positions over the last decade. E. Christianson was one of the employees under the newly developed career ladder in 2010. Since that time E. Christianson reported the number of polling places has greatly increased, the number of staff needed during election times has increased, absentee ballot requests have increased, the election laws have become more complicated, and the need to switch gears due to last minute election law changes have become the norm with every election. An increase in early voting and early voting initiatives dramatically impacted the amount of time everyone in the office spends on election activities. Typically the Clerk's Office may have anywhere from three to five dozen hourly employees working an average election that need to be managed. The Clerk's Office now allows voting at libraries, expanded other voting location options, and during COVID they sponsored events like Democracy in the Park to ensure voters had safe accessible polling locations. This type of planning shows a tremendous amount of creative thinking and takes a great deal of effort from the whole team.

Certified Municipal Clerks created and facilitate the election training for 30 to 50 Special Election Officials who administer absentee ballots in nursing homes and care facilities; while the Municipal Clerks assist with overall election logistics and fielding questions. N. Perez indicated that election reconciliation has also become more complex. Prior to 2018, they filled out a few pages of reports regarding voting numbers at polling locations. Now they are required to dig much deeper and use investigative math to figure out issues when the polling numbers are off. N. Perez developed a training in order to train others how to complete this process. Municipal Clerks were also called on to assist with the recount for the 2020 federal election. M. McClain discussed the importance of their role to clearly explain the voting process to the public. M. McClain also shared that all the Municipal Clerks are responsible to ensure every polling place is set up for success. In addition to assisting the public, both the Certified Municipal Clerks and Municipal Clerk 2 employees provide Election Day assistance to poll workers for problem solving a wide variety of issues with laptops, tabulator jams, and other polling site problems that arise. It is the expectation the Municipal Clerks 2s can resolve these issues independently and their ability to operate autonomously increases through the classification series progression. The Municipal Clerk 2 employees also update press releases and media contact lists, create social media posts, participate in grant writing, and conduct voter outreach.

In addition to the election work Municipal Clerks assist vendors and the City with the alcohol licensing process, enter information into Legistar, provide Legistar training, and staff an array of City boards, committees and commission meetings. This requires the knowledge of multiple software programs, an understanding of ordinances and laws surrounding alcohol licensing, an understanding of training principles, and knowledge of parliamentary procedure. They also need to be knowledgeable of the wide array of other City services and functions, as the Clerk's Office is often the first place community members contact for information.

For the purpose of this piece of the study I reviewed the Judicial Support Clerk Series classification. This is a 3 level progression series similarly structured to the Municipal Clerk Series. The classification of Judicial Support Clerk is defined as:

... **responsible specialized clerical work in support** of the programs and activities of the Madison Municipal Court, an independent branch of government operated under the jurisdiction of an elected Municipal Judge. Under the general supervision of the Municipal Judge, employees in this class **exercise independent judgment, discretion and neutrality within the restrictions required** for appropriate court operations. The work includes processing legal records, providing related information to interested parties, and performing office functions. [emphasis added]

Similar to the Judicial Support Clerk the Municipal Clerks perform procedural activities with their focus being on alcohol licensing and running elections. Both classifications work with specific software to enter information into a legal/legislative system, provide information and referrals to the public regarding their respective area of focus, and provide important documentation related to specialized ordinance related matters. With these series, these positions require leadership over junior employees. Also the level of specialization, independence, and discretion of employees in these classifications similarly progresses over time.

In addition, the level of programmatic responsibility increases as Municipal Clerk's progress which is also similar the Program Assistant classification series. I found that programmatic proficiencies in particular begin at the Municipal Clerk 2 level with responsibilities ranging from conducting voter outreach, assisting with social media outreach, and more understanding of alcohol licensing procedures and options. The Judicial Support Clerks and Certified Municipal Clerks both perform the work of the lower level classifications within their series and with greater skill and independence. The highest level of the Judicial Clerk series functions as a leadworker; while the Certified Municipal Clerk the most proficient in the full scope of duties while providing leadership and work direction to junior level staff. Due to the changes in the Municipal Clerk series responsibilities over the last decade, it is my recommendation that the Judicial Support Clerk series ranges would be more comparable to the Certified Municipal Clerk and Municipal Clerk classifications. It is also my recommendation that the Municipal Clerk 1 would remain at its current classification level. The Judicial Support Clerk 1 is also classified at CG 20, R 9. Both roles are entry-level position very similar to Administrative Clerks (CG20, R 9) where individuals have the opportunity to progress as their skills and knowledge increase; but generally does not have programmatic or leadership responsibilities.

Lastly, I reviewed the Legislative Management System Specialist classification (CG 20, Range 16) as part of this study. While Municipal Clerks do have some cross over legislative duties, Open Meetings Law and legislative support only account for 10 percent of the Municipal Clerks'

responsibilities. The Legislative Management System Specialist works specifically with the 20 alders on the Common Council, to assist them with various legislative system tasks and this accounts for 55 percent of this position's time. In addition, the Legislative Systems Management Specialist serves as the main City contact and liaison with the software vendor to troubleshoot problems and address updates as needed. Therefore it would not be reasonable to recommend the Certified Municipal Clerk be classified at this same level as the Legislative Management System Specialist.

Based on my review of these positions and the above mentioned classifications, I recommend a new classification of Deputy City Clerk be created in CG 18, R 7, the Municipal Clerk 1 classification shall remain in CG 20, R 9 as the entry level position, the Municipal Clerk 2 classification be recreated in CG 20, R 11, the Certified Municipal Clerk classification be recreated in CG 20, R 13 and the incumbents should be reallocated to the new positions.

The necessary resolution to implement this recommendation has been drafted.

Editor's Note:

Compensation Group/Range	2022 Annual Minimum (Step 1)	2022 Annual Maximum (Step 5)	2022 Annual Maximum (+12% Longevity)
20/9	\$47,618.48	\$53,540.76	\$59,965.62
20/11	\$50,518.26	\$56,547.40	\$63,333.14
20/13	\$53,540.76	\$59,698.86	\$66,862.64
18/3	\$55,967.34	\$63,818.56	\$71,476.86
18/7	\$63,818.56	\$75,599.42	\$84,671.34

Municipal Clerk series and Certified Municipal Clerk Effective Date: 5/16/2021

Deputy City Clerk Effective Date: 9/5/2021

Cc: Maribeth Witzel-Behl, City Clerk
 Greg Leifer, Employee and Labor Relations Manager
 Harper Donahue, HR Director
 Joe Seifert, Local 6000
 Incumbents