



Economic Development Resources for Local Communities:

As of 1/1/2017, county economic development responsibilities will be transferred to County Administrator, Larry Bierke. Larry will utilize his expertise to further economic development in the county and will provide support and guidance to local communities where appropriate. Larry can be reached at (608) 935-0318, or email: larry.bierke@iowacounty.org.

If your community learns that there will be a business expanding, or that is considering locating in your community, Iowa County would like to support you. Contact Larry to discuss the project and identify ways to ensure that you're successful in attracting that development. Conversely, if you become aware of a business who is struggling, laying off people, or closing, please do not hesitate to let the county know.

To assist in the transition, following is a summary of resources and contacts that Iowa County community leaders might find helpful to support local economic development efforts.

Iowa County's economic development website, <http://iowacountyedc.com>, will be updated in December and will provide community profiles, demographic information and links to other business resources.

Small Business Development Center (SBDC) – If you have questions from someone who needs help with business planning or starting a business, direct them to the SBDC <http://wisconsinsbdc.org>. They can also call the free business answers line (1-800-940-7232) or [sign up online](#) for a free, confidential consultation. Brock Waterman is the SBDC Business Consultant for our area. He can be reached directly at 608-574-1757 (Cell), or brock.waterman@uwex.edu

Southwest Wisconsin Regional Planning Commission (SWWRPC) – With the assistance of grants, county funding contributions and contractual arrangements, SWWRPC provides a variety of services including GIS mapping, comprehensive planning, grant request preparation and administration, economic development consultations, and revolving loan fund administration. Contact Troy Maggied, Executive Director, to discuss your community's specific needs – phone: (608)342-1636 or email: t.maggied@swwrpc.org.

Southwest Wisconsin Workforce Development Board (SWWDB) – SWWDB works within the workforce system to facilitate solutions for businesses with workforce challenges. Also, if you are aware of a local employer who is laying off employees, please refer the laid off persons SWWDB to determine whether they are eligible for re-training grant assistance. Check out their website for more details, www.swwdb.org, or contact the Business Services Coordinator, Anna Schramke, 608-342-4220 ext. 232, email: a.schramke@swwdb.org.

Madison Region Economic Partnership (MadREP) – Iowa County is part of a state recognized regional economic development organization. MadREP is actively working to promote economic development in the region. Community leaders who are involved with local economic development are encouraged to participate in a group called the MadREP ED Pros. ED Pros meets quarterly at various locations throughout the 8-county region. Their website, <http://madisonregion.org/>, has links to many demographic reports, upcoming events, and business resources local leaders might find helpful when working with economic development projects.

Wisconsin Economic Development Corporation (WEDC) – Check out the InWisconsin.com website for grant information and other resources about site selection, entrepreneurship, community development and much more. For direct assistance, you might also contact the WEDC Regional Account Manager – Mark Tallman, mark.tallman@wedc.org, or call: 608-210-6852.

Wisconsin Department of Administration (DOA) – The DOA Office of Business Development helps support job growth in Wisconsin and serves as a liaison between business, the Small Business Regulatory Review Board, the legislature and state agencies. The DOA Bureau of Community Development administers the Community Development Block Grant (CDBG), which includes the Public Facilities program, Economic Development Program, Planning Program and Revolving Loan Fund administration. The DOA website can be found at: www.doa.state.wi.us, or call: (608) 266-7531.

IOWA COUNTY ECONOMIC DEVELOPMENT

Southwest WI Regional Planning Commission

September 29, 2016 – November 22, 2016, Activity Report

We are finishing up work on several projects in Iowa County. Ed has completed the community profiles, and they should be ready to be put on the website pending review by Larry Bierke. We are nearing completion of our updating of the City of Dodgeville's zoning maps and updates to the data and mapping in their Comprehensive Plan. Ed and Anna are preparing a transition document to leave with Larry Bierke as he takes over economic development duties.

Community Economic Development Activity:

- Highland Grocery Store – Need to meet with the building owner.
- Finalized website outline forwarded to website consultant, Barry Hottman. The estimate for updating site is \$750. Waiting for approval.
- Updating LOIS site & building a database.

Existing Business Activity:

- Midwest Poultry & Ratite Processing, Highland – Nothing new.
- Midwest Grain Roasters, Dodgeville – project being scaled back due to financing limitations.
- B&B Laminates, Arena – business touch; still working on the expansion of the building.
- Mill Creek Cheese – BRE call.
- Arena Cheese – BRE call.
- Lake Louie Brewery – business touch (business canceled BRE meeting).
- Bio Vet Inc. – business touch.
- The Peoples Community Bank – business touch.
- Quantum Devices – business touch.
- Summit Golf Brands – BRE call.
- Deer Valley Lodge – BRE call.

Meetings –

9/29 Met w/ E. Hamilton to review revised plan.

10/6 Ed Met with the General Government Committee.

10/13 Met w/ R. Pittman, Mill Creek Cheese – business retention call.

Met w/B.Hanson, Arena Cheese – business retention call.

Met w/J.Manteufel, The Peoples Bank – business resources for new and expanding businesses in Iowa County.

Met w/M.Legler - VP IT & Distribution and D.Melendez – SVP Operations & Systems Re: workforce challenges and other business retention issues.

- 10/18 Met w/P.Fritsch Re: Dodgeville ED issues.
Met w/E.White Re: Administrative issues.
- 11/1 Met w/E.White & P.Fritsch, Re: transition plan.
- 11/4 Attended quarterly ED Pros MadRep meeting at Waunakee HS Innovation Center.
- 11/9 Met w/P.Fritsch Re: Dodgeville ED issues.
- 11/10 Attended SWCAP Annual Dinner.
- 11/14 Conference Call w/B.Waterman – SBDC.
- 11/16 Attended meeting w/B.Cauffman, L.Bierke, R.Hamilton Re: Midwest Poultry workout.
- 11/17 Met w/A.Elvert, Deer Valley Lodge, Re: BRE issues.

Respectfully submitted by Anna Schramke
November 22, 2016

CITY OF DODGEVILLE
Southwestern Wisconsin Regional Planning Commission
OCTOBER 2016 Report – Phyllis Fritsch

Community Economic Development Activity:

New businesses opening in the City of Dodgeville:

- *Larsen Tax Service has sold, effective November 1, 2016, to Tracy Zander, CPA. Advertising has begun that states it is Zander Tax Service, formerly known as Larsen Tax Service. Ms. Zander is a Certified Public Accountant and has worked in Mr. Larsen's tax service for the past couple of years.
- China One Restaurant is redecorated and under new management, with good reviews to date, opening on October 15, 2016.

*= Economic Development City of Dodgeville involvement

Existing Business Activity:

- One downtown business owner continues to look for a new business to occupy the building and has started to advertise the business for sale.
- One landowner plans to build as soon as lease tenants are located.
- Local industrial business is seeking product expansion.
- A downtown location is selling; excellent opportunity for retail business(es). The owner continues to show property through the contracted realtor.
- A business owner is looking for a buyer.
- A business owner is looking for an appropriate location.

New Business Assistance/Entrepreneurship:

- Meetings and investigation continue with the new business, assisting with a business plan and to prepare to present financing requests to lenders. These meetings have been ongoing since I began in March. Past meetings have included the Small Business Development Council, banking representative from a Bank doing SBA loans, a business consultant, an investor and possible franchise options. A potential buyer has decided not to move forward until Spring except to continue to work to reduce or eliminate liens on the property.
- An initial meeting related to a buy-out of an existing business has been accomplished, and business plans are being developed. A local bank indicates this project is too large. The potential purchaser has placed this on hold until mid-October 2016.
- Contacted by another potential new business regarding the purchase of land and buildings in the City. They have hired a structural engineer to approve the type of business planned in the structure, and have costs to renovate. Plan to meet in October re purchase options, historical potential, and possible investors.
- Contacted by a potential new food truck business. They will target 2017. Assisting in the business planning and financial information. Neither the Small Business Development Center (SBDC) representative nor I have had our recent calls returned, so the status of this is currently unknown.
- Current business owner plans to develop a new type of business downtown, possibly in 2017.
- Another manufacturer is seeking acreage, possibly in the City of Dodgeville. Wants to be in a city's TID. The consultant is assisting in seeking final plans and financing. The consultant does not feel Dodgeville has an appropriate location. Follow-up with consultant indicates they are developing and pricing plans and will search for a site at a later time.
- Greg Lee, Randy Edge and I continue to work with a warehousing business that has broken ground in Dodgeville's TID-2. We await permits related to construction in the Spring, as well as a possible developer's agreement.
- One business planning expansion, pending equipment set-up and permitting.
- Regional business is searching for lease property. Working with the property owner who recently purchased retail property, not downtown.
- A proposal was forwarded in early October for a possible manufacturer to be located in the TID-2. Competition is stiff for us to obtain this manufacturer. This opportunity again points up the need for the City to obtain property in preparation for an industry or manufacturer to locate or to expand.

- Losing one small office located in Woody Erickson's building to Mt. Horeb this month. They work primarily with Duluth Trading and will expand into a newly created office space in Mt. Horeb.
- GoVirtual Office is expanding and has purchased the old Dodgeville Clinic building, most recently owned by the County, on West Fountain Street. With their remodel, there will be locations for two additional offices, approximately 1,000 square feet each.
- Driftless Conservancy is expanding and moving into the Barnabas House on South Iowa Street, with a move possibly in November.
- Salon 110 in the Town and Country Insurance Office Building is moving into space across from Walgreens previously occupied by Lina Peterson's salon. That Johns Street building is now owned by Mike and Lori Fisher.
- The lower level of the CrestRidge Memory Unit is being remodeled in anticipation of an existing business currently located elsewhere in the City to expand into part of that space.
- Weinbrenner Shoes, a work-shoe manufacturer in mid-Wisconsin, is finalizing their 125th-anniversary catalog, featuring, among other cities, a shoe named for the City of Dodgeville. This international catalog will feature four photos taken earlier this year in the City. It will be distributed to Europe, Asia, Australia and their dealer base in the USA, and should be out within the next month.
- I continue to do BRE related "cold calls" on Dodgeville business owners/managers. Estimated to be approximately ¾ completed of all Dodgeville businesses.

Meetings:

- 10/3 – Meeting to discuss investor groups.
- 10/5 – Two meetings to discuss investor groups.
- 10/10 – SBDC Monthly Economic Development Phone Conference.
- 10/10 – Conference call with property owners regarding lease space.
- 10/11 – Meeting with Dodgeville Chamber Director.
- 10/12 – League of Municipalities Regional Meeting on Legislative Priorities.
- 10/13 – Spoke at the Mission Village of Dodgeville Open House on behalf of the Mayor and City Council, discussing "Good Things Happening in the City of Dodgeville."
- 10/15 - Attended the Dodgeville Fire, EMS, and Police Recognition Open House.
- 10/18 – Meeting with Anna Schramke, SWWRPC.
- 10/18 – Met with DNR regarding an Archery in Schools event to be held in April 2017 at the Ley Pavilion, Harris Park, Dodgeville.
- 10/18 – Presented quarterly report to the Dodgeville City Council.
- 10/19 – Met with a business owner regarding possible business expansion.
- 10/24 – Visiting three new businesses with Chamber Director as a welcome into the community.
- 10/24 – Planning to attend the Special Council Budget Meeting.
- 10/26 – Conducting a Community Development Committee Meeting with the Chair.

CITY OF DODGEVILLE

Southwestern Wisconsin Regional Planning Commission

NOVEMBER 2016 Report – Phyllis Fritsch

Community Economic Development Activity:

New businesses opening in the City of Dodgeville:

- *Source2Market poured construction footings for their 40,000-sq. ft. warehouse in the TID-2.
- *Tracy Zander, CPA, Zander Tax Service, began new ownership of the previous Larsen Tax Service on November 1.
- *Driftless Conservancy moved into the former Barnabas House. This is an expansion of staff and space.
- Salon 110 moved from the Town and Country Insurance Office on Division Street into a Johns Street building across from Walgreens, now owned by Mike and Lori Fisher.
- The lower level of CrestRidge Memory Care Unit is being remodeled in anticipation of an existing business currently located elsewhere in the City to expand into part of that space.
- *Weinbrenner Shoes released their catalog featuring a shoe named after the City of Dodgeville. Catalog release in Europe, Asia, Australia and to their dealer base in the USA.
- Bob's Electric recently underwent parking lot and concrete upgrades, as well as paint.
- *Deco Supply continues to paint, change windows and doors, updating the inside and adding new roofing.

*= Economic Development City of Dodgeville involvement

Existing Business Activity:

- One downtown business owner continues to look for a new business to occupy the building and has started to advertise the business for sale.
- One landowner plans to build as soon as lease tenants are located.
- Local industrial business is seeking product expansion.
- The downtown location is selling; excellent opportunity for retail business(es). The owner continues to show property through the contracted realtor.
- A business owner is looking for a buyer.
- A business owner is looking for an appropriate location.

New Business Assistance/Entrepreneurship:

- Phone calls continue with a new business, assisting in developing a business plan and to prepare to present financing requests to lenders. These meetings have been ongoing since I began in March. Past meetings have included the Small Business Development Council, banking representative from a Bank doing SBA loans, a business consultant, an investor and possible franchise options. Potential buyer has decided not to move forward until Spring except to continue to work to reduce or eliminate liens on the property.
- An initial meeting related to a buy-out of an existing business has been accomplished, and business plans are being developed. A local bank indicates this project is too large. The potential purchaser placed this on hold until mid-October 2016. Recent contacts have not resulted in return calls.
- Contacted by another potential new business regarding the purchase of land and buildings in the City. They have hired a structural engineer to approve the type of business planned in the structure, and have costs to renovate. Met this month with the Small Business Development Center (SBDC) to construct a final business plan and financials.
- Contacted by a potential new food truck business. They will target 2017. Assisting in the business plan and financial information. Neither the Small Business Development Center (SBDC) representative nor I have had our recent calls returned, so the status of this is currently unknown.
- Current business owner plans to develop a new type of business downtown, possibly in 2017.
- Another manufacturer is seeking acreage, possibly in the City of Dodgeville. Wants to be in a city's TID. The consultant is assisting in seeking final plans and financing. The consultant does not feel Dodgeville has an appropriate location. Follow-up with consultant indicates they are developing and pricing plans and will search for a site later.
- One business planning expansion, pending equipment set-up and permitting.
- Regional business is searching for lease property. Have provided at least five suggestions for property meeting square footage and handicapped accessibility requirements.
- A proposal forwarded in early October for a possible manufacturer to locate in the TID-2. Competition is stiff for us to obtain this manufacturer. This opportunity again points up the need for the City to obtain property in preparation for an industry or manufacturer to locate or to expand. No new information except that they are preparing financials and will continue to search for a site after information from funding sources is received, and that Dodgeville continues to be one of the cities of interest.
- One business considering expansion into two businesses, one to potentially locate in TID-2.

- GoVirtual Office is expanding and has purchased the old Dodgeville Clinic building, most recently owned by the County, on West Fountain Street. They will occupy this space in December. With their remodel, there will be locations for two additional offices, approximately 1,000 square feet each, available later in 2017.
- I continue to do BRE related “cold calls” on Dodgeville business owners/managers. Estimated to be more than ¾ completed of all Dodgeville businesses.

Meetings:

11/1 Meeting with representative of CrestRidge re property availability.
11/1 Meeting with Anna Schramke.
11/3 Meeting with business to potentially occupy the property.
11/9 Meeting with Anna Schramke.
11/10 Meeting with business to potentially occupy property (2nd meeting).
11/14 SBDC monthly phone conference.
11/14 Meeting with area representative regarding nursing home changes.
11/15 Meeting with Prairie du Chien’s economic development coordinator in Fennimore.
11/15 Meeting with SBDC representative and potential local business.
11/18 Met with Prosperity Southwest.
11/22 Attended local Mental Health Workshop online.
11/28 Met with a representative for the Madison Region Economic Development magazine.
11/29 Plan to meet with the Southwestern Wisconsin Regional Planning Commission (SwwRPC).
11/29 Plan to meet with Troy Maggied and Ed White, SwwRPC.
Three meetings to begin a listing of potential property or business investors.

Southwestern Wisconsin Regional Planning Commission Input/Assistance:

Meetings with Anna Schramke.
Two drafts of Phase I of the Comprehensive Plan for the City of Dodgeville.

Respectfully submitted, Phyllis A. Fritsch

AGENDA ITEM COVER SHEET

Title: Performance Evaluation Form

☒ Original

☐ Update

TO BE COMPLETED BY COUNTY DEPARTMENT HEAD

DESCRIPTION OF AGENDA ITEM (Please provide detailed information, including deadline):

Updated the Performance Evaluation Form. I have highlighted all the changes in yellow that department heads discussed and agreed upon.

RECOMMENDATIONS (IF ANY):

Adopt revised Performance Evaluation Form

ANY ATTACHMENTS? (Only 1 copy is needed)

☒ Yes

☐ No

If yes, please list below:

Performance Evaluation Form

FISCAL IMPACT:

NA

LEGAL REVIEW PERFORMED:

☐ Yes

☒ No

PUBLICATION REQUIRED:

☐ Yes

☒ No

STAFF PRESENTATION?:

☒ Yes

☐ No

How much time is needed? 5-10 minutes

COMPLETED BY: Allison Leitzinger

DEPT: Employee Relations

2/3 VOTE REQUIRED:

☐ Yes

☒ No

TO BE COMPLETED BY COMMITTEE CHAIR

MEETING DATE:

AGENDA ITEM #

COMMITTEE ACTION:



Iowa County

Employee Performance Evaluation

Employee Name:	Department:
Type of Evaluation: Annual	Position:
Evaluation Period :	Review Date:

JOB DESCRIPTION

Have the essential duties and responsibilities of the job description been discussed and reviewed with the employee and do both the employee and manager have a clear understanding of the expectations of the position?

Yes _____ No _____

MISSION SECTION

"Iowa County provides quality services in the most effective and efficient manner possible to the citizens, customers, and team members of Iowa County"

Does the employee know and understand the important role they have in the County's Mission?

Yes _____ No _____

RELATIONSHIP BETWEEN EMPLOYEE AND MANAGER

How do you feel the working relationship is? _____

(Please rate the relationship between a 1 and 5, with 5 having a great working relationship)

Please list any comments or concerns:

PERFORMANCE FACTOR SECTION

Performance Factor Rating Definitions:

Read each definition carefully. Place a check in the box that best summarizes the employee's performance for that factor since the last evaluation; or for employees new to their position, for the period of time they have held the position. After completing the rating for each factor, enter appropriate comments to support your rating.

Exceeds Expectations: Demonstrates performance at a significantly higher level when compared to the expectations of the job. Employee exceeds the standards and requirements for successful performance. Employee possesses all necessary skills and has a sound, effective and thorough working knowledge of all aspects of responsibilities. (2 points)

Meets Expectations: Demonstrates consistent performance at an acceptable level. Employee successfully completes the assigned work, with few exceptions. (1 point)

Does not Meet Expectations: Demonstrates performance below acceptable levels and does not meet the standards and requirements for acceptable performance in the areas being rated. Employee at times is inconsistent and ineffective. (0 points)

General Employee Competencies

ATTENDANCE	Does not Meet Expectations (0 points)	Meets Expectations (1 point)	Exceeds Expectations (2 points)
Is punctual and makes productive use of working hours.			NA
Properly uses MTO, sick, compensatory time, flex, breaks and lunch periods. Adjusts schedule to meet Department needs when asked.			
Participates and completes all required meetings and trainings.			NA
COMMENTS:			

JOB KNOWLEDGE	Does not Meet Expectations (0 points)	Meets Expectations (1 point)	Exceeds Expectations (2 points)
Demonstrates appropriate expertise to perform their job.			
Gives priority to staying current with information pertinent to their job.			
Shares job knowledge with co-workers			
Identifies and utilizes resources effectively and responsibly.			
COMMENTS:			

JOB PERFORMANCE	Does not Meet Expectations (0 points)	Meets Expectations (1 point)	Exceeds Expectations (2 points)
Complies with the various regulatory components required of their job.			NA
Is effective in time management (able to prioritize, be organized, meet deadlines and regularly produce high quality work).			
Adapts well to new situations, unusual demands, emergencies or critical incidents.			
Demonstrates initiative consistent with job expectations to improve performance.			
Makes good judgments and decisions.			
Is able to identify and resolve problems and challenges.			
COMMENTS:			

COMMUNICATION & CUSTOMER SERVICE	Does not Meet Expectations (0 points)	Meets Expectations (1 point)	Exceeds Expectations (2 points)
Communicates effectively in writing and/or orally at the level required regardless of the audience.			
Readily shares necessary/pertinent information and responds with appropriate feedback.			
Demonstrates good listening skills and responds appropriately.			
Demonstrates a clear understanding of customer needs and responds promptly to requests.			
Treats all customers with dignity and respect and handles interactions diplomatically while maintaining customer confidentiality.			
Establishes and maintains effective contact with customers.			
COMMENTS:			

ATTITUDE, PROFESSIONALISM & TEAMWORK	Does not Meet Expectations (0 points)	Meets Expectations (1 point)	Exceeds Expectations (2 points)
Maintains a professional appearance, demeanor and proper hygiene.			NA
Keeps his/her workplace clean and organized.			NA
Recognizes and doesn't contribute to gossip, disrespectful or unprofessional behavior, workplace harassment or bullying.			
Presents a willingness and demonstrated ability to cooperate and work with co-workers, supervisors, customers and general public.			
Is open to constructive criticism, suggestions and takes direction willingly.			
Demonstrates the ability to adapt to both unexpected and planned changing work pressures in a constructive/positive manner.			
Accepts responsibility/accountability for their actions and decisions.			
Views the success of the organization and team as more important than individual needs and desires.			
Contributes and promotes teamwork to the department in a cooperative work environment.			
COMMENTS:			

SAFETY & FOLLOWING POLICIES AND PROCEDURES	Does not Meet Expectations (0 points)	Meets Expectations (1 point)	Exceeds Expectations (2 points)
Annually reviews and understands safety plan.			NA
Follows County and department policies procedure, work rules and ensures the proper handling and care of County property, equipment, vehicles and computers/software.			NA
Performs duties in a safe manner and exercises preventative & precautionary safety practices.			
Identifies and reports hazards, unsafe working conditions, work related accidents, injuries, and damages in a timely manner per policies and takes precautions to prevent future incidents.			
COMMENTS:			

COACHING & DELEGATION	Does not Meet Expectations (0 points)	Meets Expectations (1 point)	Exceeds Expectations (2 points)
Provides timely guidance and feedback to help employees accomplish a task, solve problems and continue professional development.			
Appropriately delegates job responsibility to employee in order to accomplish goals and priorities of the department.			
Provides on-going constructive and/or positive feedback.			
COMMENTS:			

*Management Personnel Only

TEAM LEADERSHIP & FACILITATING CHANGE	Does not Meet Expectations (0 points)	Meets Expectations (1 point)	Exceeds Expectations (2 points)
Demonstrates ability to educate and lead employees on department policies, job knowledge and overall mission of the department.			
Appropriately holds employees accountable for expectations of their position.			
Assists in the development and facilitation of department and/or organizational changes.			
Demonstrates ability to motivate others to meet a common goal.			
COMMENTS:			

*Management Personnel Only

BUDGET	Does not Meet Expectations (0 points)	Meets Expectations (1 point)	Exceeds Expectations (2 points)
Budget Management			
COMMENTS:			

*Management Personnel Only

GOAL SETTING SECTION			
List as least <u>two</u> S.M.A.R.T goals for accomplishment/improvement/development. Indicate date(s) when these goals are expected to be accomplished. (S – Specific, M – Measureable, A – Assignable, R – Realistic, T – Time based)			
GOAL SETTING	Does not Meet Expectations (0 points)	Meets Expectations (1 point)	Exceeds Expectations (2 points)
Completed last year goals.			
COMMENTS:			

SPECIAL ACCOMPLISHMENTS SECTION
List any accomplishments achieved during the last year.

Overall Core Competency Rating:

Attendance	_____ / 4
Job Knowledge	_____ / 8
Job Performance	_____ / 11
Communication and Customer Service	_____ / 12
Attitude, Professionalism, Teamwork	_____ / 16
Safety and Following Policies and Procedures	_____ / 6
Goal Setting	_____ / 2

Total Core Competency Rating _____

Management Competency Ratings:

Coaching and Delegation*	_____ / 6
Team Leadership and Facilitating Change*	_____ / 8
Budget*	_____ / 2

Total Rating _____

EMPLOYEE COMMENTS:

(Please use additional sheet if necessary)

EMPLOYEE RECOMMENDATIONS:

(Please use additional sheet if necessary)

REQUIRED SIGNATURES:

Parties have read and discussed this evaluation and understand its contents.

Employee: _____

Date: _____

Direct Manager(s): _____

Date: _____

Department Head: _____

Date: _____

Employee Relations Review: _____

Date: _____

AGENDA ITEM COVER SHEET

Title: Employee Handbook

☒ Original

☐ Update

TO BE COMPLETED BY COUNTY DEPARTMENT HEAD

DESCRIPTION OF AGENDA ITEM (Please provide detailed information, including deadline):

Overall the handbook has been a great tool for all Iowa County Employees. The following are a couple of changes proposed to be made:

1. Performance Evaluation Policy - simply the point ratings needed to be changes as the Performance Evaluation has more points available.
2. Health Insurance - I noticed when the handbook was adopted they percentage of premiums paid by the County for employees that worked part-time based upon their hour requirement were listed wrong. This is change is to modify them back to the percentages that were previously adopted in November 2014.
3. Emergency Disaster Call In-Pay (New Section) - this is a policy to address compensation for non-exempt employees who may be called in to assist in an Emergency Disaster event. This excludes the Highway Laborer Staff as they are subject to the shift differential pay outlined in the Highway Addendum.
4. Wisconsin Bone Marrow and Organ Donation Leave Act (New Section) - Wisconsin passed a law stated employers needed to provide job protected leave for the purpose of undergoing a bone marrow or organ donation procedure. This will act in the same nature of an FMLA.
5. Highway Addendum - Shift Differential Pay - Added the office/administration staff is excluded from the shift differential policy.

All changes have been made in red ink.

RECOMMENDATIONS (IF ANY):

Adopt revised changes/updates to the handbook

ANY ATTACHMENTS? (Only 1 copy is needed)

☒ Yes

☐ No

If yes, please list below:

Table of Contents - Shows all the changes made.
5.6 Performance Evaluation Reviews and Pay for Performance
7.2 Health Insurance
5.4 Emergency Disaster Call In-Pay
6.10 Wisconsin Bone Marrow and Organ Donation Leave Act
Highway Addendum - Shift Differential Pay

FISCAL IMPACT:

NA

LEGAL REVIEW PERFORMED:

☐ Yes

☒ No

PUBLICATION REQUIRED:

☐ Yes

☒ No

STAFF PRESENTATION?:

☒ Yes

☐ No

How much time is needed? 5-10 minutes

COMPLETED BY: Allison Leitzinger _____

DEPT: Employee Relations _____

2/3 VOTE REQUIRED: ☐ Yes ☒ No

TO BE COMPLETED BY COMMITTEE CHAIR

MEETING DATE:

AGENDA ITEM #

COMMITTEE ACTION:

Table of Contents

Section 1: Introduction

1.1 Policy Statement.....	1
1.2 Equal Opportunity Employment/Affirmative Action Policy.....	1

Section 2: Recruitment and Separation

2.1 Recruitment.....	2
2.2 Internships.....	3
2.3 Nepotism/Fraternization.....	3
2.4 Orientation.....	5
2.5 Resignation.....	6

Section 3: Employment

3.1 Background Checks.....	7
3.2 Fitness for Duty Exam.....	7
3.3 Employee Classification Status.....	8
3.4 Transfers and Promotions.....	8
3.5 Hire Date/Status Date/Anniversary Date.....	9
3.6 Pay Periods.....	9
3.7 Direct Deposit.....	9
3.8 Personal Data Change.....	9
3.9 Death.....	10
3.10 Reduction in Workforce.....	10
3.11 Personnel Files.....	10
3.12 References/Employment Verifications.....	10
3.13 Discipline.....	11
3.14 Grievance.....	12

Section 4: Employment Expectations

4.1 Safety and Personal Protective Equipment.....	15
4.2 Appearance and Demeanor.....	16
4.2a Shoe Allowance/Reimbursement.....	18

Adopted 04/19/2016

4.3 Tardiness.....	18
4.4 Attendance and Absence.....	19
4.5 Other Employment.....	20
4.6 Photo Identification Badges.....	20
4.7 Workplace Smoking.....	20
4.8 Alcohol and Drugs.....	21
4.9 Return of County Property.....	22
4.10 Electronic Communication and Internet use – Acceptable Use.....	23
4.11 Mobile Device – Acceptable Use.....	30
4.12 Social Media – Acceptable Use.....	32

Section 5: Compensation

5.1 Wages.....	33
5.2 Temporary Wage Adjustment.....	33
5.3 On-Call Pay.....	34
5.4 Emergency Disaster Call In-Pay.....New Draft – 11/2016.....	34
5.5 New Hire Compensation Package.....	34
5.6 Performance Evaluations.....Draft Revisions – 11/2016.....	35
5.7 Timesheets/Reporting.....	37
5.7a Flex Time.....	38
5.8 Overtime.....	39
5.9 Compensatory Time.....	39
5.10 Expense Reimbursement.....	40

Section 6: Time at Work/Time Away

6.1 Hours of Work.....	42
6.2 Lunch/Meal Period.....	43
6.3 Managed Time Off (MTO).....	43
6.4 Holidays.....	49
6.5 Jury Duty.....	50
6.6 Voting Leave.....	50
6.7 Emergency/EMS Leave.....	50

6.8 Family and Medical Leave.....	52
6.9 Military Leave.....	52
6.10 Bone Marrow and Organ Donation Leave..... New Draft – 11/2016.....	53
6.11 General/Personal Leave.....	53
6.12 Suspension of Operations.....	54
6.13 Employee Loss and Damage Policy.....	54

Section 7: Benefits

7.1 Wisconsin Retirement.....	54
7.2 Health Insurance..... Draft Revisions – 11/2016.....	55
7.3 Dental Insurance.....	56
7.4 Life Insurance.....	57
7.5 Vision Insurance.....	57
7.6 Domestic Partnership.....	57
7.7 Disability Insurance.....	57
7.8 Deferred Compensation.....	58
7.9 Long Term Care Insurance.....	58
7.10 Flexible Spending Plan.....	58
7.11 Section 125.....	59
7.12 COBRA.....	59
7.13 Benefit Payout.....	60
7.14 Employee Assistant Program.....	60
7.15 Workers Compensation.....	60

Section 8: Workplace Policies

8.1 Harassment/Retaliation.....	61
8.2 Respect in the Workplace.....	62
8.3 Weapons in the Workplace.....	63
8.4 Workplace Violence.....	64

Addendum Statement.....	A
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Highway Department Addendum.....	1-1
Bloomfield Healthcare Addendum.....	2-1

Adopted 04/19/2016

Updates to Employee Handbook

5.56 Performance Evaluation Reviews and Pay for Performance

Iowa County provides annual performance evaluations with all employees. Performance evaluations are designed to acknowledge employees achievements and assist employees in improving their job performance.

Managers and Department Heads are responsible for conducting annual performance evaluations with employees whom they supervise.

Employee performance is evaluated annually on employee's date of hire. Management employees who were promoted into a management position prior to October 5, 2014 will use their status date instead of hire date. All employees are evaluated on the following core competencies:

- Attendance
- Job Knowledge
- Job Performance
- Communication and Customer Service
- Attitude, Professionalism and Teamwork
- Safety and Following Policies and Procedures
- Goal Setting

In addition to the above core competencies, management employees are evaluated on the following leadership core competencies:

- Coaching and Delegation
- Team Leadership and Facilitating Change
- Budget Management

Employee's shall complete a self-evaluation and submit to their manager no more than a month prior, but at least two weeks before evaluation date. Failure to complete self-evaluation is reflected in performance review. Managers complete and review a separate performance evaluation with the employee. The manager submits the completed evaluation and status change form to Employee Relations before the end of the payroll week in which the evaluation date occurred. Employee Relations provides the status change form to Finance/Payroll.

Status change forms are not processed until Employee Relations receives the completed performance evaluation review.

Performance Factor Rating

Step Process (Minimum- Step 1 up to Control Point-Step 6):

Non-Management Employees:

Employees within the step portion of the Iowa County Wage Structure receiving a rating of 30 points to 47 points get a "Meets Expectations" rating, which includes a pay increase to the next step. Employees receiving a rating of 29 points or below get a "Does not Meet Expectation" rating, which provides no step increase. Employees receiving a rating of 48 points or more get an "Exceeds Expectation" rating, which results in a pay increase of two steps.

Managers that do not have Budget responsibilities:

Employees within the step portion of the Iowa County Wage Structure receiving a rating of 37 points to 58 points get a "Meets Expectations" rating, which includes a pay increase to the next step. Employees receiving a rating of 36 points or below get a "Does not Meet Expectation" rating, which provides no step increase. Employees receiving a rating of 59 points or more get an "Exceeds Expectation" rating, which result in a pay increase of two steps.

Management Employees:

Employees within the step portion of the Iowa County Wage Structure receiving a rating of 38 points to 60 points get a "Meets Expectations" rating, which includes a pay increase to the next step. Employees receiving a rating of 37 points or below get a "Does not Meet Expectation" rating, which provides no step increase. Employees receiving a rating of 61 points or more get an "Exceeds Expectation" rating, which result in a pay increase of two steps.

All performance evaluations including management and non-management reviews that get an "Exceeds Expectations" rating need to be discussed and approved by the County Administrator.

Pay for Performance (Control Point – Step 6 to Maximum):

Employees who receive a rating of "Exceeds Expectations" are eligible for Pay for Performance. An "Exceeds Expectations" rating is 48 points or more for non-management employees, 59 for management employees with no budget responsibilities and 61 points or more for management employees.

Employees will receive a two (2%) performance bonus of current base rate, which will be divided within 26 pay periods plus a two (2%) base wage increase.

When an employee is on Step 5 and receives an "Exceeds Expectations", employee will receive a one and a half (1.5%) performance bonus of current base rate, which will be divided within 26 pay periods plus a one (1%) base wage increase of Step 6.

The performance bonus pay will exhaust after the 26 pay periods unless employees receives an "Exceeds Expectations" rating at their next annual performance review.

All pay including base wage and bonus pay cannot exceed the maximum step unless approved by County Board. If an employee is near maximum, they will earn the base wage increase before the performance bonus pay.

All performance evaluations including management and non-management reviews that get an "Exceeds Expectations" rating needs to be discussed and approved by the County Administrator.

7.2 Health Insurance

Iowa County provides health insurance through the State of Wisconsin Group Health Insurance Program. Iowa County participates in the Local Deductible Plan. Eligibility is based upon an employee qualifying for the Wisconsin Retirement System.

The availability of health insurance plans and the application of health insurance premiums cost sharing formulas are solely determined by the County Board and are subject to changes without notice.

The Health Insurance Contribution Level Chart indicates the average percentage of the four qualified plans (Unity Community, Dean Health Plan, Physicians Plus and Medical Associates) the County will pay based upon the number of hours an employee was hired to work.

Employee premium contribution percentages are subject to change every year.

Health Insurance Contribution Level		
Level	Hours Normally Worked in a Pay Period	Percentage of Premium Paid by the County based on the average premium cost of qualified plans
Level 1	64 or More Hours	85%
Level 2	At Least 60 Hours but Less Than 64 Hours	66% 73%
Level 3	At Least 48 Hours but Less Than 60 Hours	56% 63%
Level 4	At least 40 Hours but Less than 48 May or May not be eligible for Health Insurance, based on WRS eligibility	50%
Level 5	Less than 20 Hours May or May not be eligible for Health Insurance, based on WRS eligibility	County may pay as little as 25% of the lowest qualifying plan

Employees who are WRS Retirement eligible may continue their ETF health insurance at their own expense at the time of their retirement.

Qualified employee's coverage is effective the 1st of the month after 30 days of employment.

Employees may elect upon initial enrollment, during “It’s Your Choice” Open Enrollment and/or within 30 days of a qualifying event.

New Sections:

5.4 Emergency Disaster Call In-Pay

All Iowa County Employees are subject to “call in” for the purpose of a Large Emergency or Disaster. A “call in” could occur anytime of the day or night. In the event of a Large Emergency or Disaster, non-exempt employee’s hours that are worked between 10:00 p.m. and 6 a.m. will be paid at time and one-half and will also count towards total hours worked for that week. This excludes the Highway Laborer staff, as they are subject to differential pay as outlined in the Highway Addendum.

6.10 Wisconsin Bone Marrow and Organ Donation Leave Act

The Wisconsin Bone Marrow and Organ Donation Leave Act provides qualifying employees with up to six (6) weeks of job-protected leave in a twelve (12) month period for the purpose of undergoing a bone marrow or organ donation procedure and to recover from the procedure.

To qualify for leave an employee must have worked for the County for at least 52 consecutive weeks and have worked at least 1,000 hours during the 52 week period prior to the start of leave.

Employees intending to take leave for the purpose of serving as a bone marrow or organ donor must make a reasonable effort to schedule the donation procedure so that it does not unduly disrupt the County’s operations, subject to the approval of the health care provider of the bone marrow or organ donee. Employees must submit a NON FMLA/FMLA Leave Request Form to their Department Head/Manager at least 30 days in advance of the leave when possible. In addition, the employee must submit a State Healthcare Provider Certification prior to the commencement of leave when possible.

Leave taken under the Wisconsin Bone Marrow and Organ Donation Lave will be unpaid, unless employee choses to substitute sick, vacation, or other accrued time off. Employees enrolled in the County’s group health and dental plans will maintain their coverage during the leave under the same terms as if the employee continued to work. The employee will be required to pay their regular portion of insurance premiums.

Employees returning from leave must provide a “Return to Work” form signed by their health care provider.

HIGHWAY DEPARTMENT ADDENDUM

Lunch/Meal Period

During summer hours; the lunch break is adjusted to be 20 minutes in duration and is a paid break.

Early Snow Plow Break: Employees who get called in for snow plowing/removal and are expected to report to work prior to 5:00 a.m. will be allowed to take a 30 minute break. Employees are expected to complete one cycle through their sections prior to this meal break. Nonetheless, after one cycle through the section, the employee may take this meal break after calling the office over the radio, unless management reasonably objects.

This early snow plow break is in lieu of the fifteen (15) minute morning break. Highway Management may determine that an additional morning break of ten (10) minutes may be appropriate.

Normal Work Hours:

Iowa County Highway Department, normal work hours shall be established as 6:00 a.m. to 4:00 p.m. Monday through Friday. Employees shall receive their regular rate of pay for all hours worked within the Normal Work Hours established. The Department may fluctuate its' normal starting time within those timeframes without incurring shift differential pay. If the Department sets hours of work outside of these timeframes, employees shall receive a shift differential pay rate for all hours worked, pursuant to the Shift Differential policy.

Observed Holidays:

A non-exempt Highway Department employee, who is required to work on a day recognized as one of the nine (9) Observed Holidays on the annual County Observed Holiday calendar for management and non-represented employees; shall receive a shift differential pay for all hours worked, pursuant to the Shift Differential policy.

On Call/Call Back Pay:

A non-exempt Highway Department employee who is required to respond to a call for assistance during hours other than Normal Work Hours will receive a minimum of two (2) hours of pay regardless of the amount of time worked in responding to that request for assistance. Additional working hours accumulated will be paid at the employee's rate of pay; subject to the Shift Differential policy, until the requirement for overtime pay is met.

Shift Differential Pay:

^ non-exempt Highway Department employee, who is required to work hours other than those within the normal Work Hours, will receive a shift differential rate of pay. The shift differential rate of pay shall be established as 1 and ½ times the normal regular rate of pay for the position held. Highway Department office/administration staff is excluded from the shift differential policy.

Tardiness:

Arriving on the job at the time you are scheduled to work is both a courtesy and an obligation owed to the County, co-workers and the public we service. Iowa County Highway Department expects that all employees will arrive to work on time. All tardiness will be considered unexcused. Employees are expected to notify managers immediately of their tardiness.

Iowa County Highway Department employees who violate this policy may be subject to disciplinary action including up to termination.

In events that are unforeseen, Iowa County Highway Management may grant an excused tardiness.

Tool Requirement:

Shop Operations Lead and Mechanics are required to provide, maintain and be responsible for a set of personal tools and equipment for the performance of basic mechanical duties and repairs.

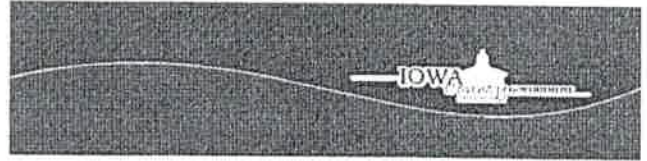
Please see Department for list of required tools.

Iowa County provides insurance on the tools for emergency disasters, such as a fire, that occur on Iowa County property.

EMPLOYEE RELATIONS

The Courthouse
222 North Iowa Street
Dodgeville, WI 53533-1564

Phone: (608) 935-0374
Fax: (608) 935-0325
allison.leitzinger@iowacounty.org



www.iowacounty.org

TO: General Government Committee
FROM: Allison Leitzinger, Employee Relations Director
DATE: November 30, 2016
RE: Employment Activity Report

Outlined below is the employment activity for October and November:

- ADRC Department Assistant – New hire started November 21.
- ADRC Manager – Internal promotion effective October 3.
- ADRC Lead Information and Assistance Specialist – Internal promotion effective November 7.
- ADRC Information and Assistance Specialist – Interviews held in October and December 7.
- Sheriff's Office Dispatcher/Correctional Officer – New hire started October 24.
- Deputy Treasurer – First review scheduled for Friday, December 2.
- Sheriff's Officer Dispatcher/Correctional Officer (2 positions) – Deadline is Monday, December 5.
- Certified Nursing Assistants – New hire started November 10; ongoing recruitment
- Bloomfield Healthcare Registered Nurse/LPN – ongoing recruitment.
- Bloomfield Healthcare Nurse Manager (2 positions) – New hire started November 21 and internal promotion effective November 28.
- Bloomfield Healthcare Employee Relations Assistant – First review of candidates in progress.

5.9 Expense Reimbursement

All Iowa County employees may request reimbursement for travel expenses and other expenses as authorized by their respective Department Heads and provided herein. Employees shall be required to complete an Expense Reimbursement form before reimbursement will be provided. Employees are to request reimbursement of expense on a monthly basis.

Automobile/Vehicle Travel: To be eligible, an employee shall hold a valid driver's license. Reimbursement for automobile/vehicle travel will be at the current year's IRS mileage rate for travel directly related for actual necessary and reasonable itemized travel costs incurred while on official authorized County business. Commuting mileage between an employee's residence and his/her normal place of employment are not reimbursable.

Mileage reimbursement will only be made to those employees who hold a valid driver's license and have filed proof of insurance. The County will accept a certificate of insurance or a copy of the declaration page indicating the amount of coverage for liability and an expiration date as proof of insurance. The employee's proof of insurance must be filed with the County Clerk's Office for each vehicle used while on County business. Per Iowa County's Insurance Company, personal automobile insurance shall be in the amount of:

\$100,000 per person;

\$300,000 per accident bodily injury;

\$100,000 combined single limit.

In the event that more than one eligible person is traveling to the same destination, shall make every attempt to carpool to reduce travel expense. In such case, mileage shall be paid to the eligible person actually providing the automobile/vehicle transportation.

Public transportation: Employees who have prior authorization shall receive full reimbursement for authorized travel by plane, train or bus. An employee should make every effort to locate the lowest and most reasonably priced transportation before authorization. Prior to departure, a purchase order and/or sale tax exemption certification should be obtained from the Finance Director.

Meal: Actual and reasonable expense reimbursement will be allowed for meals outside Iowa County provided a detailed receipt is furnished. No reimbursement shall be made for the cost of alcohol beverages or for tips over fifteen percent (15%). Maximum amount allowed per meal, including tax and tip are:

Meal	Amount for In-State Travel	Amount for Out-of-State Travel
Breakfast	\$8.00	\$10.00
Lunch	\$9.00 –\$12.00	\$10.00 –\$15.00
Evening Meal	\$17.00 –\$20.00	\$20.00 –\$23.00

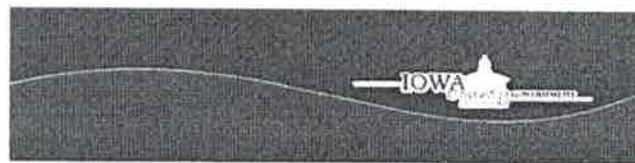
Lodging: Employees shall be reimbursed for the expense of a reasonably priced hotel or motel at the single room rate. If employees share a room with other Iowa County employees, a higher room rate would be allowed. An employee is required to find the most reasonable lodging in the area. In the event that a significant other of an Iowa County employee shares a room, reimbursement shall be made only at the single room rate. If the County is directly billed for the lodging expense, the above restrictions apply. Receipts shall be submitted for

all lodging expense. Lodging expenses for an eligible person attending meetings or conferences within a 60 mile radius of the county seat shall not be reimbursed without prior approval of the County Administrator. Consideration will be given for the previous night lodging for conferences/seminars/meetings/trainings that start prior to 8:00 a.m. and are further than 80 miles from the County Courthouse. An eligible employee seeking reimbursement for lodging expenses within a 60-mile radius of the County Courthouse shall make a written request for County Administrator approval. The request shall include the reasons why reimbursement should be granted, which has been approved by the Department Head. Request shall be attached with the employee's reimbursement expense and/or the voucher requesting payment for lodging expenses.

EMPLOYEE RELATIONS

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