

Department of Employee Relations

Cavalier Johnson Mayor

Harper Donahue, IV Director

Molly King Employee Benefits Director

Nicole M. Fleck Labor Negotiator

May 20, 2024

Board of City Service Commission Department of Employee Relations 200 East Wells Street, Room 706 Milwaukee, WI 53202

Re: Request to Extend Temporary Appointment – Sarah Trotter

Dear Board of City Service Commissioners,

The Department of Employee Relations respectfully request approval to extend the temporary appointment of Sarah Trotter as Human Resources Manager for the Department of Employee Relations from July 17th, 2024 through Saturday, April 26th, 2025. This is the first extension request.

Ms. Trotter's temporary appointment started on April 15, 2024 to assist DER's Compensation Team with an unprecedented number of requests for classification and market studies. Ms. Trotter support will include functions such as report writing, report implementation and other duties as current staff members are delegated to work projects related to the citywide Peoplesoft replacement project. Additionally, Ms. Trotter will assist with providing leadership and supervisory functions and also work in a technical advisory capacity to the Compensation Manager Andrea Knickerbocker.

Ms. Trotter is exceptionally qualified as she holds a Bachelor of Science in Business Administration and as well as a Juris Doctorate. Additionally, she has 39 years of experience in the areas of compensation, classification, equal employment opportunity, staffing, training and labor relations.

Thank you for your consideration should commissioners have any questions Department of Employee Relations staff will be available at the meeting to answer.

Respectfully,

Harper Donahue, IV Employee Relations Director



Department of Employee Relations 200 E. Wells Street, Room 706 Milwaukee, WI 53202-3554



NOTICE OF TEMPORARY APPOINTMENT

Rule IX, Section 2 of the Civil Service Rules allows a department to appoint a person to a position on a temporary basis. A temporary appointment may be appropriate when services are for a limited period, or during the leave of absence of an employee who plans to return to the service of the city. Therefore a temporary appointment is limited to a period of 90 days, unless an extension is authorized by the City Service Commission.

When making an employment offer for a temporary appointment, the appointing officer must submit this completed form to DER no later than the close of the pay period in which the temporary appointment has been made. All temporary appointees must meet the minimum requirements established for the position to which the individual is appointed.

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EMPORARY APPOINTMENT / APPOINTEE		State State State State State State State State	Contraction of the local distance of the loc	FIRST NAME		INITIAL
EPARTMENT/DIVISION				Sarah		
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During Leave of Absence of an emp	loyee who is expected to return	7/17/2024	4/2	6/2025	\$4,038	.35
To perform services of a temporary	nature and for a limited period					- Harrison -
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Department of Employee Relations 200 E. Wells Street, Room 706 Milwaukee, WI 53202-3554



TEMPORARY APPOINTEE STATEMENT OF UNDERSTANDING

Rule IX, Section 2 of the Civil Service Rules allows a hiring authority to appoint a person to a position on a temporary basis. A temporary appointment may be appropriate when services are for a limited period, or during the leave of absence of an employee who plans to return to the service of the city. Therefore a temporary appointment is limited to a period of 90 days, unless an extension is authorized by the City Service Commission.

SECTION I. TO BE COMPLETED BY HIRING AUTHORITY - PLEASE TYPE OR PRINT LEGIBLY

APPLICANT NAME (last, first, middle)		DATE
Sarah Trotter		
POSITION TITLE	PAY RANGE	RATE OF PAY
Human Resources Manager	1JX	\$4,038.35

SECTION II. TEMPORARY APPOINTEE STATEMENT OF UNDERSTANDING

I understand that if I am appointed to the position described above on a temporary basis, that I must meet the requirements for the position. I further understand that this temporary appointment may expire at any time and is limited to a period of 90 days, unless an extension at the request of the hiring authority is approved by the City of Milwaukee Civil Service Commission.

I understand that as a temporary appointee I am ineligible for paid holidays, sick leave, vacation or other benefits while serving on this temporary appointment, and that this temporary appointment shall not confer upon me any privilege of regular appointment. (Note: A current City of Milwaukee employee who accepts a temporary appointment to a different position retains his/her current benefits and civil service status).

I understand that if I wish to be considered for regular employment I must compete in a Civil Service examination for the position, and must pass the examination with a grade which shall place me among the top five scores on the eligible list in order to be eligible to interview for regular appointment to the position.

I understand that acceptance of a temporary appointment will not affect my rights to certification for permanent appointment to any position for which I am currently on an eligible list for.

In accordance with Civil Service Rule VIII, Section 10, concerning nepotism, I hereby certify that I am not related, either by blood or through marriage, to the appointing officer or to any member of the appointive board or body or to any direct superior or to any elective or appointive City official. (This includes relative of both whole and half blood, and extends to persons as closely related as first cousins when the relationship is by blood, or more closely related than first cousins when the relationship is through marriage, and includes the cases of husbands of sisters-in-law and wives of brothers-in-law).

A Rule IX, Section 2, temporary appointee who is on an eligible list may be considered for future regular appointment when the appointee ranks among the certifiable highest eligible on the list, or compete in a future examination.

H. hatter

Temporary Appointment Applicant Signature

4/17/24 Date Signed Andrea

Witness Signature

JOB DESCRIPTION

Instructions: Complete all sections. Refer to the *Guidelines for Preparing Job Descriptions* for instructions on completing specific items.

FOR DER USE ONLY

Vacancy No.	
City Service	· F
Commission:	
Fire & Police	
Commission:	C C

Finance Committee: Common Council:

1. Date Prepared/ Revised:	2. Present Incumbent: None			Is incumber	nt underfillin	g position?	
3. Date Filled:	4. Previous Incumbent: None			If YES, indicate Underfill Title in box 10.			
		Burea Divisi	on: Operations	Unit: Section: Co	Unit: Section: Compensation Services		
6. Work Location: 200 E Wells St, Room 706		Telephone: Email:		Work Schedule: Hours: 7:45 AM - 4:45 PM / Days: M- F			
7. Represented by a 8. Bargaining Unit: N Union? ☐ Yes ⊠ No If in District Council 48		Non-Mgmt/Non-Rep 48, which local?		LSA Status (d xempt 🛛 N	check one): Non-Exempt		
10. Official Title: Human Resources Manag Underfill Title (if applic Requested Title (if applic	cable):	title)		Pay Range 1JX	Job Code	EEO Code	
Recommended Title (DER Use Only):			Approved by:				
			Date:				

11. BASIC FUNCTION OF POSITION:

This Human Resources Manager is responsible for providing leadership and supervisor of the DER Compensation team, and providing technical and advisory support to the DER Compensation Manager (HR Manager).

12. DESCRIPTION OF JOB (Check if description applies to Official Title 🖂 or Underfill Title 🗌):

A. ESSENTIAL FUNCTIONS/Duties and Responsibilities: (Refer to the "Guidelines for Preparing Job Descriptions" for instructions on determining Essential Functions.)

% of Time	ESSENTIAL FUNCTION
	 Supervision/Leadership Provide guidance and information concerning Classification reports and Job Studies to DER Compensation Human Resources Reps and Analyst-Senior. Research and recommend rule changes, policies, guidelines and procedures as related to the City Service Commission and Salary Ordinance; represent DER before the CSC, FPC and Finance. Assist the Compensation Manager in delegating tasks and reviewing the work of team members.
	 Research Study new and existing jobs for proper classification and rates of pay. Perform market pay studies for job classifications. Job shadow current City employees to gather information about a position's duties. Study job descriptions of internal and external positions to learn more about their responsibilities and minimum requirements for the purpose of determining comparability. Provide guidance in various HR and payroll functions throughout the City, including Fire and Police; this includes interpreting and administering policies and procedures relating to Compensation and Human Capital Management (HCM) entries. Generate various reports and data, including for the annual budget.
	 Analytics Compare and contrast positions under study to other current City of Milwaukee and external positions. Determine appropriate position titles and pay ranges.

% of Time	ESSENTIAL FUNCTION
•	Determine methods to make pay practices more effective through job classification studies.

B. PERIPHERAL DUTIES:

% of Time	PERIPHERAL DUTY

C. NAME AND TITLE OF <u>IMMEDIATE</u> SUPERVISOR: Andrea Knickerbocker, Human Resources Manager

D. SUPERVISION RECEIVED: (Describe the extent to which work assignments and methods are outlined, reviewed, and approved by this position's supervisor.)

Performs functions independently, with minimal supervision.

E. SUPERVISION EXERCISED:

Total number of employees for whom responsible, either directly or indirectly = $\underline{0}$.

<u>Direct Supervision</u>: List the number and titles of personnel directly supervised. Specify the kind and extent of supervision exercised by indicating one or more of the following:

a. Assign c	luties	e.	Sign or approve work		
	 Outline methods 		Make hiring recommendations		
			Prepare performance appraisals		
d. Check o	r inspect completed work	h.	Take disciplinary action or effectively recommend such		
Number Supervised	Job Title		Extent of Supervision Exercised (Select those that apply from list above, a - h)		
2	Human Resources Rep		a-e		
2					
2	Human Resources Rep		a-e		

F. MINIMIMUM QUALIFICATIONS REQUIRED: (Indicate the MINIMUM qualifications required to <u>enter</u> the job.)

i. Education and Experience:

1. Master's degree from an accredited college or university with a major in industrial psychology, human resources management, public administration or a related field, including coursework in testing and statistics.

2. Three years of progressively responsible experience in the development, administration and validation of personnel selection procedures, including application of related principles, practices, techniques and legal consideration.

ii. Knowledge, Skills and Abilities:

Technical

- General knowledge of the principles and practices of human resources administration.
- Ability to gain expertise regarding public sector human resources best practices.
- Ability to prepare well-researched, data-supported logical arguments in support of recommendations.
- Ability to learn and apply job analysis methods and to perform related research.
- Ability to perform accurate data entry and mathematical calculations relating to pay and budget.
- Ability to conduct in-depth analysis using traditional and advanced methods.
- Skill in conducting statistical and technical research.
- Ability to read, understand, interpret, and apply job-related material such as laws, Civil Service rules, and policies.
- Knowledge of mathematics and the ability to understand, interpret, and calculate complex formulas.

- Knowledge of grammatical and punctuation conventions.
- Ability to learn and effectively use the JobAps applicant tracking system and employee data systems such as Oracle's PeopleSoft Human Capital Management (HCM) system and Financial Management Information System (FMIS) to produce reports and to retrieve data.
- Proficiency using standard computer programs such as Microsoft Word, Excel, PowerPoint, and Teams.
- Knowledge of equity initiatives and a commitment to diversity and inclusion.

Communication/Interpersonal

- Verbal communication skills to be able to appear before committees to present reports and work with representatives from other jurisdictions regarding salary studies.
- Written communication skills to prepare recommendation reports that are thorough, clear, wellcrafted, and error-free.
- Ability to express oneself clearly in conversations and interactions with others.
- Ability to demonstrate concern for satisfying external and/or internal customers.
- Ability to exercise tact and diplomacy.
- Ability to gain others' support for ideas, proposals, projects, and solutions.
- Skill in identifying information needed to clarify a situation, seeking the information from appropriate sources, and using skillful questioning to draw out the information when others are reluctant to disclose it.
- Effective meeting facilitation skills.
- Ability to work effectively and positively with people whose backgrounds may differ from one's own.
- Ability to foster teamwork and desire to work cooperatively with others on a team.

Judgment/Organizational/Analytical

- Ability to set challenging goals, focus effort on the goals, and meet or exceed them.
- Ability to approach a problem by using a logical, systematic, and sequential approach.
- Ability to use sound judgment when making decisions.
- Ability to organize assignments and manage time to complete tasks based on departmental deadlines.
- Ability to protect the confidentiality of human resources information.
- Ability to remain professional at all times.
- Honesty and integrity.
- iii. <u>Certifications, Licenses, Registrations:</u> N/A
- iv. Other Requirements:

N/A

13. PHYSICAL AND ENVIRONMENTAL DEMANDS: TOOLS AND EQUIPMENT USED

The Americans with Disabilities Act (ADA) of 1990, as amended by the Americans with Disabilities Act Amendments Act (ADAAA) of 2008 requires job descriptions to provide detailed information regarding the physical demands required to perform the essential functions of a job; the conditions under which the job is performed; and the tools and equipment the employee will be required to use on the job. Reasonable accommodations may be made to enable qualified individuals to perform the essential duties and responsibilities of the job for each of the categories listed below.

G. PHYSICAL ACTIVITY OF THE POSITION: (List the physical activities that are representative of those that <u>must</u> be met to successfully perform the essential functions of the job).

CHECK ALL THAT APPLY:

Climbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles, and the like; using feet and
legs and/or hands and arms. Body agility is emphasized. Check only if the amount and kind of climbing required exceeds that required for ordinary locomotion.
Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on parrow
slippery or erratically moving surfaces. Check only if the amount and kind of balancing exceeds that needed for ordinary locomotion and maintenance of body equilibrium.

	Stooping: Bending body downward and forward by bending spine at the waist. Check only if it occurs to a
	Considerable degree and requires full use of the lower extremities and back muscles
	Kneeling: Bending legs at knee to come to a rest on knee or knees.
	Crouching: Bending the body downward and forward by bending leg and spine.
	Crawling: Moving about on hands and knees or hands and feet.
	Reaching: Extending Hand(s) and arm(s) in any direction.
	Standing: Particularly for sustained periods of time.
\boxtimes	Walking: Moving about on foot to accomplish tasks, particularly for long distances.
\square	Pushing: Using upper extremities to exert force in order to draw, press against something with steady
	force in order to thrust forward, downward or outward.
\boxtimes	Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained
	motion.
	LiftIng: Raising objects from a lower to a higher position or moving objects horizontally from position-to-
	position. Check only if it occurs to a considerable degree and requires substantial use of the upper
	extremities and back muscles.
\boxtimes	
	Fingering: Picking, pinching, typing or otherwise working primarily with fingers rather than with the whole hand or arm, as in handling.
57	And or ann, as in narioing.
	Grasping: Applying pressure to an object with fingers and palm.
\boxtimes	Feeling: Perceiving attributes of objects such as size, shape, temperature or texture by touching with the
	skin, particularly that of the fingertips.
	Talking: Expressing or exchanging ideas by means of the spoken word. Those activities which demand
	detailed or important instructions spoken to other workers accurately, loudly or quickly.
\square	Hearing: Perceiving the nature of sounds with no less than a 40 db loss. Ability to receive oral
	communication and make fine discriminations in sound.
	Panetitive Motions: Subtotion measure (mations) of the series in the second
	Repetitive Motions: Substantial movements (motions) of the wrist, hands, and/or fingers.
	Driving: Minimum standards required by State Law (including license).

H. PHYSICAL REQUIREMENTS OF THE POSITION: (List the physical requirements that are essential functions of the job.)

CHECK ONE:

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
Light Work: Exerting up to 10 pounds of force occasionally and/or negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for sedentary work and the worker sits most of the time, the job is rated for Light Work.
Medium Work: Exerting up to 50 pounds of force occasionally and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
Heavy Work: Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
Very Heavy Work: Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

I. VISUAL ACUITY REQUIREMENTS: (List the visual acuity requirements that are essential functions of the job.)

CHECK ONE:

	Operators (Electronic Equipment), Inspection, Close Assembly, Clerical, Administrative:
	This is a minimum standard for use with those whose job requires work done at close visual range (i.e. preparing
	and analyzing date and figure assembling the worker jub requires work done at close visual range (i.e. preparing
	and analyzing data and figures, accounting, transcription, computer terminal, extensive reading, visual inspection
	involving small parts, operation of machines, using measurement devices, assembly or fabrication of parts).
	Machine Operators, Mechanics, Skilled Tradespeople: This is a minimum standard for use with these where
	WORK deals with machines where the seeing job is at or within arm's reach. This also includes mechanics and
	skilled tradespeople and those who do work of a non-repetitive nature such as carpenters, technicians, service
	needle plumbers, nainters, mechanica etc. (If the mechanic alucit as carpenters, technicians, service
	people, plumbers, painters, mechanics, etc. (If the machine operator also inspects, check the "Operators" box.)
	Mobile Equipment Operators: This is a minimum standard for use with those who operate cars, trucks, forklifts,
	Cranes, and high lift equipment.
	Other: This is a minimum standard based on the criteria of accuracy and neatness of work for janitors, sweepers,
	etc.

J. THE CONDITIONS THE WORKER WILL BE SUBJECT TO IN THIS POSITION:

List the environmental/working conditions to which the employee may be exposed while performing the essential functions of the job. Include scheduling considerations such as on-call for emergencies, rotating shift, etc. Approximate Percentage of time performing field work: 0%

CHECK ALL THAT APPLY:

	ONEON ALL MATAFFET.		
\boxtimes	None: The worker is not substantially exposed to adverse environmental conditions (such as typical office or administrative work).		
	The worker is subject to inside environmental conditions: Protection from weather conditions but not necessarily from temperature changes (<i>i.e. warehouses, covered loading docks, garages, etc.</i>)		
	The worker is subject to outside environmental conditions: No effective protection from weather		
	The worker is subject to extreme cold: Temperatures below 32 degrees for period of more than one hour.		
	The worker is subject to extreme heat: Temperatures above 100 degrees for periods of more than one hour		
	The worker is subject to noise: There is sufficient noise to cause the worker to shout in order to be heard above the surrounding noise level.		
	The worker is subject to vibration: Exposure to oscillating movements of the extremities or whole body.		
	The worker is subject to hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, electrical current, working on scaffolding and high places or exposure to chemicals		
	respiratory system or the skin: Fumes, odors, dust, mists, gases or near ventilation		
	The worker is subject to oil: There is air and/or skin exposure to oils and other cutting fluids.		
	The worker is required to wear a respirator.		

K. MACHINE, TOOLS, EQUIPMENT, ELECTRONIC DEVICES, SOFTWARE, ETC. USED BY POSITION: List equipment needed to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.)

CHECK ALL THAT APPLY:

 Camera and photographic equipment Cleaning supplies Commercial vehicle Data processing equipment Handcart 	 Office Equipment (desk, chair, telephone, etc.) Office supplies (pens, staplers, pencils, etc.) Packing materials (boxes, shrink wrap, etc.) PC equipment (monitor, keyboard, printer, etc.) PC software
Hand tools (please list):	
Office Machines (check all that apply):	🛛 Copier 🛛 Facsimile 🖾 Calculator 🗌 Cash register
Other (please list):	

- L. SUPPLEMENTARY INFORMATION: (Indicate any other information which further explains the importance, difficulty, or uniqueness of the position, such as its scope of responsibility related to finances, equipment, people, information, etc. Also indicate success factors such a personal characteristics that contribute to an individual's ability to perform well in the job, and any other special considerations.)
- M. I believe that the statements made above in describing this job are complete and accurate.

Signature of Department Head or Designated Representative

Sarah Trotter, CPM

SUMMARY:

Human Resources professional with 39 years of experience in the areas of compensation, classification, equal employment opportunity, staffing, training, and labor relations.

EXPERIENCE:

City of Milwaukee – Department of Employee Relations (DER)	
Human Resources Representative	1999 - 2023
Personnel Analyst – Lead	1994 – 1999
Personnel Analyst - Senior	1984 - 1994
Personnel Analyst	1983 - 1984

2003 - 2023

Focus of work was compensation and classification but based on previous training and experience periodically assisted with equal employment opportunity, staffing, training, and labor relations.

- Prepared classification and compensation reports including department and division reorganizations.
- Performed market studies using salary surveys, the Economic Resource Institute (ERI) and other sources of market data. Responded to salary surveys from other jurisdictions and provided guidance and information concerning pay to DER staff, City departments, and employees.
- Met with department representatives regarding reports and represented DER before the City Service Commission and the Fire and Police Commission.
- Assisted with changes in the Salary and Positions Ordinances, communications to departments, and implementation of recommendations.
- Assisted with researching and recommending changes in rules, policies, guidelines, and procedures as relates to the City Service Commission and Salary Ordinance.
- Served for many years on the City-wide and department committees for the United Performing Arts Fund (UPAF)/Visions Campaign and the Combined Giving Campaign and chaired the Committee for the annual Hot Dog Sale.

1997 - 2002

Worked on a generalized service delivery team that handled all human resources needs for assigned departments including compensation classification, equal employment opportunity, staffing, classification, training, and labor relations.

- Prepared and conducted numerous written and performance examinations, structured interviews, and evaluations of education, experience, and responses to supplemental questions.
- Served on negotiating teams for labor contracts.
- Presented various training programs including New Employee Orientation and Quality Improvement.
- Reviewed criminal records for background checks.
- Prepared classification and compensation reports including department and division reorganizations.

<u> 1989 - 1997</u>

Worked in the Equal Employment Opportunity Division.

- Drafted and compiled data for the City-wide Affirmative Action Plan which included computer reports regarding job group analysis, availability analysis, utilization analysis, and work force analysis; identification of problem areas; prior year accomplishments; and city-wide statistics for new hires, promotions, and discipline.
- Investigated complaints of discrimination and/or harassment, interviewed witnesses, researched documents, and wrote reports regarding findings and recommendations.
- Prepared and/or conducted numerous training programs regarding diversity, discrimination, harassment, accommodations, and other related topics.
- Responded to requests for information and assistance.
- Assisted in other DER Divisions as needed such as serving as a rater for an examination, and participating in department-wide committees and programs.

<u> 1984 - 1989</u>

Worked in the Classification Division.

- Prepared classification and compensation reports including department and division reorganizations.
- Made initial determinations for exempt/nonexempt status under the Fair Labor Standards Act (FLSA) for all titles in the City.
- Handled initial administrative work associated with various special projects and committees including the Pension Committee and the Management Incentive Awards Program.

<u> 1983 - 1984</u>

Worked on special projects for the City Personnel Director and Assistant City Personnel Director and managed the Summer Youth Employment Program for the summer of 1984.

PROFESSIONAL CERTIFICATIONS:

Wisconsin Certified Public Manager (CPM) University of Wisconsin – Madison, Wisconsin	March 2014
Certificate in Public Administration University of Wisconsin – Milwaukee, Wisconsin	August 2010
EDUCATION:	
Creighton University School of Law; Omaha, Nebraska Juris Doctor (J.D.)	May 1982
Creighton University College of Business; Omaha, Nebraska Bachelor of Science in Business Administration (B.S.B.A) 3-3 Program	May 1980