



MONROE COUNTY BOARD OF SUPERVISORS

202 SOUTH K STREET, RM 1, SPARTA, WISCONSIN 54656

PHONE: 608-269-8705 FAX: 608-269-8747 www.co.monroe.wi.us

MONROE COUNTY BOARD AGENDA

Wednesday, August 30, 2023 at 5:30 p.m.

McMullen Memorial County Park

Park Shelter

1703 Atlantic Road Warrens, WI 54666

**In case of inclement weather, the meeting will be held in the Monroe County Assembly Room located at 112 S Court Street, Sparta, WI 54656*

*The Monroe County Solid Waste tour will begin at 2:00 p.m.
The McMullen Park Shower Grand Opening will begin at 4:15 p.m.
Tours of McMullen Park may occur before the Shower Grand Opening starting at 2:00 p.m.
or directly following the Board Meeting.*

*A quorum of the Monroe County Board or other committees may be present during these tours.
These gatherings are for the purpose of touring these locations only.
No business of the County Board will be conducted during these tours.*

2:00 p.m.

Solid Waste Tour
20448 Junco Road Norwalk, WI 54648

4:15 p.m.

McMullen Park Shower Grand Opening, 1703 Atlantic Road, Warrens, WI 54666
**(Tours of McMullen park starting at 2:00 p.m. or directly following the Board Meeting)*

4:30-5:30 p.m.

Supper Break at the McMullen Park Shelter

5:30 p.m.

Call to Order/Roll Call
Pledge of Allegiance

Approval of Minutes – July 25, 2023

Public Comment Period

Appointment – Winding Rivers Library System, Adam Balz for a term ending 12/31/24

Budget Adjustments
Solid Waste; Maintenance; Jail

Re-Purpose of Funds
Sheriff

Resolution(s) – Discussion/Action (Listed on a Separate Sheet)

**Property & Maintenance Committee – County Building Consolidation Recommendation/
Option 1**

Motion to move into Committee of the Whole

**Monroe County Consolidated Government Building Located at the Administrative Center
Block Site in the City of Sparta/Options 1 through 4 – Discussion/Recommendation**

Motion to Return to the Board Meeting

Adjournment

**>Supervisors: Do wear your name tags, it helps visitors
>Agenda order may change**

The July meeting of the Monroe County Board of Supervisors convened in the Monroe County Board Assembly Room in the City of Sparta, Wisconsin, on Tuesday, July 25, 2023 at 6:00 p.m. Chair Cedric Schnitzler presiding. Roll Call was called with 14 Supervisors present; Supervisor Jandt and Gomez absent. The Pledge of Allegiance was recited. At 5:00 p.m., a training session on cyber security was held for the Monroe County Board of Supervisors.

Motion by Supervisor Rogalla second by Supervisor Pierce to approve the June 22 & 28, 2023 minutes. Carried by voice vote.

Public Comment Period – Four members of the public addressed the board.

Budget Adjustments:

Land Conservation – Motion by Supervisor VanWychen second by Supervisor Sparks to approve budget adjustment. Bob Micheel, Land Conservation Director explained the 2023 budget adjustment in the amount of \$108,933.16 for Wildlife Abatement Program. The adjustment passed with all Supervisors voting yes.

Zoning Board of Adjustment – Motion by Supervisor Pierce second by Supervisor Esterline to approve budget adjustment. Alison Elliott, Sanitation, Planning & Zoning and Dog Control Administrator explained the 2023 budget adjustment in the amount of \$10,000.00 for a case appeal. Discussion. The adjustment passed with all Supervisors voting yes.

Maintenance – Motion by Supervisor Pierce second by Supervisor Balz to approve budget adjustment. Derek Pierce, Facilities and Property Director explained the 2023 budget adjustment in the amount of \$130,000.00 for fuel, electricity and utility costs. Discussion. The adjustment passed with all Supervisors voting yes.

Information Systems – Motion by Supervisor Wissestad second by Supervisor Pierce to approve budget adjustment. Rick Folkedahl, IT Director explained the 2023 budget adjustment in the amount of \$120,180.00 for wireless upgrades. The adjustment passed with all Supervisors voting yes.

Dispatch – Motion by Supervisor Rogalla second by Supervisor Devine to approve budget adjustment. Chris Weaver, Chief Deputy explained the 2023 budget adjustment in the amount of \$16,392.00 for voter and microwave upgrade. The adjustment passed with all Supervisors voting yes.

Sheriff – Motion by Supervisor Rogalla second by Supervisor Wissestad to approve budget adjustment. Chris Weaver, Chief Deputy explained the 2023 budget adjustment in the amount of \$52,000.00 for Law Enforcement Grant. The adjustment passed with all Supervisors voting yes.

Pamela Pipkin, Child Support Director provided the Child Support Department report and answered questions.

Greg Pitel, Kerber Rose provided the 2022 Monroe County Audit and answered questions.

Debbie Carney, Treasurer provided the monthly Treasurer's report and answered questions.

Motion by Supervisor Rogalla second by Supervisor Kuderer to move into closed session. A roll call vote was taken with all Supervisors voting yes.

Closed Session per Wis. Stat. §19.85(1)(g) Conferring with legal counsel for the governmental body who is rendering oral or written advice concerning strategy to be adopted by the body with respect to litigation in which it is or is likely to become involved. Closed Session with Attorney Jane Landretti regarding possible litigation.

Motion by Supervisor Rogalla second by Supervisor Balz to return to open session. A roll call vote was taken with all Supervisors voting yes.

Finance Director's report – None.

Administrator's report – None.

Motion by Supervisor Devine second by Supervisor Pierce to reconsider resolution 06-23-05. A roll call vote was taken. The motion to reconsider passed (11 Y - 3 N - 2 Absent).

Schnitzler voted: Y	Pierce voted: Y	VanWychen voted: Y	Jandt was Absent
Habhegger voted: Y	Kuderer voted: Y	Wissestad voted: Y	Zebell voted: N
Sparks voted: N	Cook voted: Y	Balz voted: Y	Devine voted: Y
Gomez was Absent	Kuhn voted: Y	Esterline voted: Y	Rogalla voted: N

RESOLUTION 06-23-05

AUTHORIZING A BEHAVIORAL HEALTH SUPERVISOR POSITION IN THE MONROE COUNTY HUMAN SERVICES DEPARTMENT

The forgoing resolution was moved for adoption by Supervisor Cook second by Supervisor Esterline. Tracy Thorsen, Human Services Director explained. Discussion. The resolution passed (11 Y - 3 N - 2 Absent).

Schnitzler voted: Y	Pierce voted: Y	VanWychen voted: Y	Jandt was Absent
Habhegger voted: Y	Kuderer voted: Y	Wissestad voted: Y	Zebell voted: N
Sparks voted: N	Cook voted: Y	Balz voted: Y	Devine voted: Y
Gomez was Absent	Kuhn voted: Y	Esterline voted: Y	Rogalla voted: N

RESOLUTION 07-23-01

RECOGNITION OF THE MONROE COUNTY CHILD SUPPORT AGENCY IN THE MONTH OF AUGUST, 2023

The forgoing resolution was moved for adoption by Supervisor Kuhn second by Supervisor Devine. Pamela Pipkin, Child Support Director explained. Discussion. The resolution passed with 13 Supervisors voting yes; Supervisor Sparks voting no; 2 absent.

RESOLUTION 07-23-02

RESOLUTION APPROVING THE TOWNSHIP OF LEON'S APPLICATION AND ENTRY INTO THE SCENIC RIDGE AND VALLEY AG ENTERPRISE AREA

The forgoing resolution was moved for adoption by Supervisor Rogalla second by Supervisor Esterline. Supervisor Esterline explained. Discussion. The resolution passed with all Supervisors voting yes; 2 absent.

RESOLUTION 07-23-03

MUNICIPAL RESOLUTION DEPARTMENT OF NATURAL RESOURCES WISCONSIN ASSESSMENT MONEY (WAM) – CONTRACTOR SERVICES AWARD

The forgoing resolution was moved for adoption by Supervisor Balz second by Supervisor Pierce. Derek Pierce, Facilities & Properties Director explained. The resolution passed with all Supervisors voting yes; 2 absent.

RESOLUTION 07-23-04

RESOLUTION UNDER §59.69 WIS. STATS. TO AMEND AN ORDINANCE PERTAINING TO ZONING IN THE TOWN OF LITTLE FALLS

The forgoing resolution was moved for adoption by Supervisor Zebell second by Supervisor Kuhn. Supervisor Kuhn explained. The resolution passed with all Supervisors voting yes; 2 absent.

Strategic Plan – Supervisor Wissestad explained that all Supervisors received a draft copy of Strategic Plan. Any feedback is due by August 7, 2023. It is anticipated to bring the final plan to the board for approval in August.

Chairman's Report –

August 30, 2023 Board Meeting at 5:30 p.m. at McMullen Park

Motion by Supervisor Wissestad second by Supervisor Devine to adjourn the meeting at 9:03 p.m.

I, Shelley Bohl, Monroe County Clerk certify that to the best of my knowledge the foregoing is a correct copy of the July meeting of the Monroe County Board of Supervisors held on July 25, 2023.

MONROE COUNTY
Notice of Budgetary Adjustment
 Unanticipated Revenue or Expense Increase or Decrease Not Budgeted

Date: August 10, 2023
 Department: Solid Waste
 Amount: \$58,925.00
 Budget Year Amended: 2023

Does this Budget Adjustment decrease future fund balance available for Debt Service Payments in future years?
 Yes or No? Yes Explain: Funds from Contingency won't be available for Debt Service Payments

Source of Increase / Decrease and affect on Program:
 (If needed attached separate brief explanation.)

Our next step is to continue with the well installation in the DNR approved work plan. Ayres has given us a quote to install the wells and do two rounds of sampling. This cost is \$48,925. We will also be adding in another \$10,000 dollars from the Contingency Fund (object #499999) to the Professional Services account to fund the Stafford Rosenbaum lawyer fees as we continue through the process. The City of Sparta will pay for half of the \$48,925 (object #473500). We will use ARPA Funds for the County's half (object #435528). This brings the total adjust to \$48,925 + \$10,000 = \$58,925

Revenue Budget Lines Amended:

Org	Object	Project	Account Name	Current Budget	Budget Adjustment	Final Budget
63690000	473500		Reimb-City of Sparta	\$ -	\$ 24,462.50	\$ 24,462.50
63690000	435528		SW- ARPA Funds	\$ -	\$ 24,462.50	\$ 24,462.50
63300000	499999		Solid Waste-Transfer In	\$ 25,397.00	\$ 10,000.00	\$ 35,397.00
Total Adjustment					\$ 58,925.00	

Expenditure Budget Lines Amended:

Org	Object	Project	Account Name	Current Budget	Budget Adjustment	Final Budget
63690000	521000		Professional Services	\$ 35,397.00	\$ 48,925.00	\$ 84,322.00
63690000	521000		Professional Services	\$ 25,397.00	\$ 10,000.00	\$ 35,397.00
10010000	539200		Contingency Fund	\$ 70,578.00	\$ (10,000.00)	\$ 60,578.00
10000000	599999		Gen Fund-Transfer Out	\$ 1,560,020.31	\$ 10,000.00	\$ 1,570,020.31
Total Adjustment					\$ 58,925.00	

Department Head Approval: 

Date Approved by Committee of Jurisdiction:  8-16-2023
 Following this approval please forward to the County Clerk's Office. Date

Date Approved by Finance Committee: 8/16/23

Date Approved by County Board: _____

Per WI Stats 65.90(5)(a) must be authorized by a vote of two-thirds of the entire membership of the governing body.

Date of publication of Class 1 notice of budget amendment: _____

MONROE COUNTY
Notice of Budgetary Adjustment
 Unanticipated Revenue or Expense Increase or Decrease Not Budgeted

Date: August 9, 2023
 Department: Maintenance
 Amount: \$37,854.47
 Budget Year Amended: 2023

Does this Budget Adjustment decrease future fund balance available for Debt Service Payments in future years?
 Yes or No? No Explain: Use of the contingency funds will decrease any excess contingency allowed to roll forward into the 2024 contingency fund.

Source of Increase / Decrease and affect on Program:
 (If needed attached separate brief explanation.)

Budget Adjustment is to provide funding for the professional asbestos and hazardous materials survey services for north complex & out buildings, building B (old job center/ADRC), boiler house, and tunnel.

Revenue Budget Lines Amended:

Org	Object	Project	Account Name	Current Budget	Budget Adjustment	Final Budget
						\$ -
						\$ -
						\$ -
						\$ -
Total Adjustment					\$ -	

Expenditure Budget Lines Amended:

Org	Object	Project	Account Name	Current Budget	Budget Adjustment	Final Budget
10010000	539200		Contingency Fund	\$ 70,578.00	\$ (37,854.47)	\$ 32,723.53
11670600	521340		N Complex Contracted Serv	\$ 37,500.00	\$ 37,854.47	\$ 75,354.47
						\$ -
						\$ -
						\$ -
Total Adjustment					\$ -	

Department Head Approval: Deak Price 8/9/23

Date Approved by Committee of Jurisdiction: [Signature] 8/9/23

Following this approval please forward to the County Clerk's Office.

Date

Date Approved by Finance Committee: 08/16/23

Date Approved by County Board: _____

Per WI Stats 65.90(5)(a) must be authorized by a vote of two-thirds of the entire membership of the governing body.

Date of publication of Class 1 notice of budget amendment: _____

MONROE COUNTY

Notice of Budgetary Adjustment

Unanticipated Revenue or Expense Increase or Decrease Not Budgeted

Date: August 10, 2023
 Department: Jail
 Amount: \$16,600.00
 Budget Year Amended: 2023

Does this Budget Adjustment decrease future fund balance available for Debt Service Payments in future years?
 Yes or No? No Explain: Jail Assesment Funds

Source of Increase / Decrease and affect on Program:
 (If needed attached separate brief explanation.)

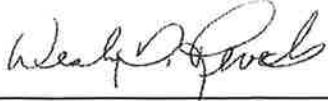
Requesting an increase to the Jail Assessment medical expense line in the amount of \$16,600.00
due to the cost of hospitalizations and required specific medications for inmates.
Using prior years funds due to increase in medical expenses.

Revenue Budget Lines Amended:

Org	Object	Project	Account Name	Current Budget	Budget Adjustment	Final Budget
82700000	493000		Fund Balance Applied	\$ 20,000.00	\$ 16,600.00	\$ 36,600.00
						\$ -
						\$ -
						\$ -
Total Adjustment					\$ 16,600.00	

Expenditure Budget Lines Amended:

Org	Object	Project	Account Name	Current Budget	Budget Adjustment	Final Budget
82700000	5211587		Medical expense	\$ 60,000.00	\$ 16,600.00	\$ 76,600.00
						\$ -
						\$ -
						\$ -
Total Adjustment					\$ 16,600.00	

Department Head Approval: 

Date Approved by Committee of Jurisdiction: Adam Balz 8/10/2023
 Following this approval please forward to the County Clerk's Office. Date

Date Approved by Finance Committee: 08/16/23

Date Approved by County Board: _____

Per WI Stats 65.90(5)(a) must be authorized by a vote of two-thirds of the entire membership of the governing body.

Date of publication of Class 1 notice of budget amendment: _____

Notice of Re-Purpose of Funds

MONROE COUNTY

Unanticipated Change of What Funds Were Budgeted For

Date: 8/10/2023
Department: SHERIFF
Amount: \$ 33,488.00
Budget Year Amended: 2023

Does this Re-Purpose of Funds decrease future fund balance available for Debt Service Payments in future years?

Yes or No? NO Explain: Funds used are from an insurance claim for a totaled squad car.

Explanation/Reason funds are being re-purposed and affect on Program:
(If needed attached separate brief explanation.)

SHERIFF'S OFFICE REQUESTING APPROVAL TO PURCHASE SQUAD CAR FOR SHERIFF FROM INSURANCE CLAIM
MONEY RECEIVED FROM TOTALED SQUAD CAR. CAR PURCHASED FOR CAPTAIN BEING MOVED TO PATROL,
CAR PURCHASED FOR SHERIFF BEING MOVED TO CAPTAIN AND THIS CAR PURCHASED FOR SHERIFF.

Original Budgeted Line's Purpose:

Org	Object	Project	Account Name	Original Purpose	New Purpose	Amount to Re-Purpose
17100169	581100		NON-LAPS SHERIFF VEHICLE		PURCHASE SHERIFF VEHICLE	\$ 33,488.00
Total Adjustment						\$ 33,488.00

Department Head Approval: _____

Committee of Jurisdiction Approval: _____

Following this approval please forward to the County Clerk's Office.

8/10/2023
Date

Date Approved by Finance Committee: _____

Date Approved by County Board: _____

Per WI Stats 65.90(5)(a) must be authorized by a vote of two-thirds of the entire membership of the governing body.

Date of publication of Class 1 notice of budget amendment: _____

RESOLUTIONS AND ORDINANCES – AUGUST 30, 2023

08-23-01

REPEALING MONROE COUNTY ORDINANCE SEC. 2-573 DESTRUCTION AND AUTHORIZING MONROE COUNTY ORDINANCE SEC. 2-573 ADOPTING RECORDS RETENTION

Offered by the Administration & Personnel Committee

08-23-02

RESOLUTION AUTHORIZING THE ESTABLISHMENT OF FULL-TIME WOMEN AND INFANT CHILDREN (WIC) NUTRITIONIST BY REDUCTION OF THE PROGRAM ASSISTANT – WIC TO PART-TIME

Offered by the Administration & Personnel Committee

08-23-03

RESOLUTION AUTHORIZING PART-TIME MUSEUM SERVICES ASSOCIATE POSITION IN THE LOCAL HISTORY ROOM

Offered by the Administration & Personnel Committee

08-23-04

RESOLUTION AUTHORIZING TEN ADDITIONAL HOURS PER WEEK FOR THE MUSEUM SERVICES ASSOCIATE POSITION IN THE LOCAL HISTORY ROOM

Offered by the Administration & Personnel Committee

08-23-05

RESOLUTION AUTHORIZING CONTRACT SETTLEMENT FOR 2024-2025 COLLECTIVE BARGAINING AGREEMENT BETWEEN MONROE COUNTY AND THE MONROE COUNTY PROFESSIONAL POLICY ASSOCIATION

Offered by the Administration & Personnel Committee

08-23-06

RESOLUTION AUTHORIZING THE MONROE COUNTY HEALTH DEPARTMENT TO EXPLORE OBTAINING ENVIRONMENTAL HEALTH AGENT STATUS FROM THE STATE OF WISCONSIN DEPARTMENT OF AGRICULTURE, TRADE & CONSUMER PROTECTION

Offered by the Health & Human Services Committee

08-23-07

RESOLUTION AUTHORIZING MONROE COUNTY LAND CONSERVATION DEPARTMENT TO SUBMIT APPLICATION TO THE SURFACE WATER GRANT PROGRAM AND ENTER A GRANT AGREEMENT TO COMPLETE AN OPEN SPACE SHORELAND PROTECTION ALONG THE LITTLE LA CROSSE RIVER

Offered by the Natural Resource and Extension Committee

08-23-08

RESOLUTION TO APPROVE THE STRATEGIC PLAN FOR MONROE COUNTY

Offered by the Administration & Personnel Committee

08-23-09

RESOLUTION APPROVING METHOD FOR IMPLEMENTATION AND MONITORING OF THE STRATEGIC PLAN

Offered by the Administration & Personnel Committee

08-23-10

RESOLUTION TO AFFIRM AND ADOPT THE RECOMMENDATION TO MOVE FORWARD WITH A CONSOLIDATED MONROE COUNTY GOVERNMENT BUILDING AT THE ADMINISTRATIVE CENTER BLOCK SITE IN THE CITY OF SPARTA

Offered by the Property & Maintenance Committee

RESOLUTION 08-23-01

**REPEALING MONROE COUNTY ORDINANCE SEC. 2-573 DESTRUCTION AND
AUTHORIZING MONROE COUNTY ORDINANCE SEC.2-573 ADOPTING RECORDS RETENTION**

1 **WHEREAS**, Monroe County currently does have a section in the General Code of Ordinances which addresses
2 records, specifically Chapter 2, ADMINISTRATION, ARTICLE VII, PUBLIC RECORDS; and
3

4 **WHEREAS**, Monroe County does not have a section in the General Code of Ordinances addressing a
5 comprehensive records retention schedule for Monroe County; and
6

7 **WHEREAS**, the State of Wisconsin, Department of Administration has established a comprehensive general
8 records schedule for use by all units of Wisconsin Government at the Municipal level which includes the retention
9 requirements for government records; and
10

11 **WHEREAS**, such a records retention schedule which also addresses the destruction of records would be in the
12 best interests of Monroe County and would assist all records custodians for Monroe County in the appropriate
13 management of all records held and maintained by Monroe County; and
14

15 **WHEREAS**, the State of Wisconsin, Department of Administration has established such a schedule which
16 includes not only the records schedule but also additional instructions regarding the adoption and implementation
17 of the records schedule to be adopted by municipalities by official County Board action, establishing an ordinance
18 with notification to the State of Wisconsin.
19

20 **NOW THEREFORE BE IT RESOLVED** that the Monroe County Board of Supervisors does hereby adopt the
21 General Records Schedule, Wisconsin Municipal and Related Records approved and adopted by the State of
22 Wisconsin Department of Administration, effective August 27, 2018 expiration August 27, 2028. (See attached).
23

24 **BE IT FUTHER RESOLVED** that the Monroe County Code of Ordinances shall hereby be amended to include the
25 General Records Schedule, Wisconsin Municipal and Related Records established by the State of Wisconsin as
26 referenced above and the Monroe County Board of Supervisors does hereby adopt by reference said records
27 schedule and any and all future modifications and extensions of said records schedule.
28

29 **BE IT FURTHER RESOLVED** that Sec. 2-573 entitled DESTRUCTION of the Monroe County Code of
30 Ordinances shall hereby be repealed as the destruction of records is addressed in the General Records
31 Schedule, Wisconsin Municipal and Related Records authorized by passage of this resolution and ordinance
32 revision.
33

34 **BE IT FURTHER RESOLVED** that the Monroe County Board of Supervisors does hereby instruct the necessary
35 Monroe County officials to complete the NOTIFICATION OF GENERAL SCHEDULES ADOPTION (PRB-002)
36 FORM and submit it to the State Archivist/Wisconsin Historical Society.
37

38 THE MONROE COUNTY BOARD OF SUPERVISORS DOES HEREBY ORDAIN AS FOLLOWS:

39
40 AMENDMENT OF MONROE COUNTY ORDINANCE CODE CHAPTER 2, ARTICLE VII TO INCLUDE THE
41 FOLLOWING:
42

43 SECTION 2-573, DESTRUCTION, is hereby repealed and replaced with:

44
45 SECTION 2-573 RECORDS RETENTION,
46 Monroe County does hereby adopt by reference the General Records Schedule, Wisconsin Municipal and
47 Related Records adopted and approved by the State of Wisconsin.
48

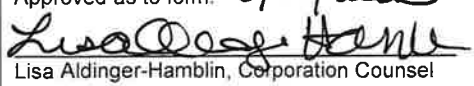



49 This ordinance shall include and does adopt any future modifications and extensions of this records schedule.
50 This ordinance does supersede any previously approved ordinance which is in conflict with this section.

Dated this 30th day of August, 2023.

Offered By: The Administration and Personnel Committee:

Fiscal note: The indirect costs of amending county ordinances. This would include publication and ordinance update costs.

Statement of purpose: To establish a comprehensive general records schedule for Monroe County.

<p>Finance Vote (If required): ___ Yes ___ No ___ Absent</p> <p>*****</p> <p>Approved as to form: <u>8/11/2023</u>  Lisa Aldinger-Hamblin, Corporation Counsel</p>	<p>Committee of Jurisdiction Forwarded on: <u>August 8</u>, 20<u>23</u> VOTE: <u>4</u> Yes <u>0</u> No <u>1</u> Absent</p> <p>Committee Chair:   </p>
<p><input type="checkbox"/> ADOPTED <input type="checkbox"/> FAILED <input type="checkbox"/> AMENDED</p> <p><input type="checkbox"/> OTHER _____</p> <p>County Board Vote on: _____ 20__ ___ Yes ___ No ___ Absent</p>	<p>STATE OF WISCONSIN COUNTY OF MONROE I, SHELLEY R. BOHL, Monroe County Clerk, DO HEREBY CERTIFY that the foregoing is a true and correct copy of Resolution # _____ acted on by the Monroe County Board of Supervisors at the meeting held on _____.</p> <hr/> <p>SHELLEY R. BOHL, MONROE COUNTY CLERK <i>A raised seal certifies an official document.</i></p>

General Records Schedule

Wisconsin Municipal and Related Records

Approved by the Public Records Board:

August 27, 2018



Expiration: August 27, 2028

For use by all units of Wisconsin Government at the Municipal level

Wisconsin Municipal Records Schedule

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Introduction:

Records are a basic tool of transacting business on behalf of all local government units. They are the foundation for government accountability. Records management is regulated by Wisconsin state law, and accordingly, the Wisconsin Municipal Records Schedule (WMRS), upon adoption, provides legal authorization to dispose of records on a regularly scheduled basis. The schedule serves as a mechanism for consistent retention and disposition of similar types of records across all municipal governments and provides assurance of accountability to the public.

The schedule was developed following guidelines for complying with legal, fiscal, and archival requirements for records retention and facilitates cost-effective management of records commonly found in municipal governments.

Wisconsin Statute § 19.21(1) defines public records as “all property and things received from the officer’s predecessor or other persons and required by law to be filed, deposited, or kept in the officer’s office, or which are in the lawful possession or control of the officer or the officer’s deputies.” Records are defined by Wisconsin Statute § 19.32(2) as “any material on which written, drawn, printed, spoken, visual, or electromagnetic information or electronically generated or stored data is recorded or preserved, regardless of physical form or characteristics, that has been created or is being kept by an authority.” Public records are also defined as being “all books, papers, maps, photographs, films, recordings, optical discs, electronically formatted documents, or other documentary materials, regardless of physical form or characteristics, made or received by any state agency or its officers or employees in connection with the transaction of public business” (Wis. Stat. § 16.61(2)(b)).

I. Applicability:

This record schedule is available for adoption by all Wisconsin municipal governments. Most municipalities do not create or receive all of the records listed within the WMRS. The inclusion of a schedule in the WMRS does not mean that a local government is responsible for creating those records. Rather, it provides guidance for records that are actually created or received by your particular unit.

Records retention guidelines apply regardless of record format. Records covered by the WMRS may be retained in electronic, paper, or other formats. The schedule applies to all records: born digital (including those created or transmitted via e-mail), data contained in database systems, tapes/cartridges and other types of electronic records and information systems maintained by agencies. Municipalities must also meet the standards and requirements for the management of electronic records outlined in [Chapter Adm. 12](#).

II. Purpose:

Record schedules are intended to be used by records creators as a tool to SIMPLIFY their records management responsibilities, not to make them more complex. It is the intention of the WMRS to streamline municipal records management by:

- Providing clear and uniform guidance for the retention and disposition of records common to most municipal governments;
- Eliminating the need for individual municipalities to develop and obtain Wisconsin Public Records Board approval of records retention/disposition schedules;
- Facilitating uniformity in the retention and disposition of records across all municipalities; and
- Promoting the cost-effective management of municipal records.

III. Implementation:

The WMRS is a schedule that municipalities MAY adopt to manage their records. Municipalities ARE NOT required to adopt the schedule for use. The WMRS does not replace the ability of municipalities to create and adopt records schedules through the creation of ordinances. See Additional Options below for more information.

To adopt the Schedule:

- Submit the [Notification of General Schedules Adoption](#) (PRB-002) form to:
State Archivist
Wisconsin Historical Society
816 State St.
Madison, WI 53706
- The Wisconsin Public Records Board (PRB) will acknowledge your Notification of Adoption by returning a signed copy of the adoption to the municipality.
- After confirmation of PRB approval, municipalities should enact an ordinance adopting the WMRS as their official schedule.

Municipalities are expected to supersede any previously approved, unique, ordinances which cover records included in the adopted Municipal Schedule. Retain any approved schedules in existing ordinances for records that ARE NOT covered by the Municipal Schedule.

Additional Options:

Wis. Stat. § 19.21(4) provides municipalities with the authority to schedule the retention of public records by creating ordinances. Municipalities that choose not to adopt the WMRS are encouraged to use the retention periods provided in the WMRS when creating their own schedules. Any municipality that decides to draft their own schedule must submit that schedule for approval to

the PRB before adopting it as an ordinance. Upon PRB approval, the schedule can be adopted for use by enacting an ordinance. Municipalities may also adopt other General Records Schedules provided by the PRB.

Municipalities also have the option of adopting separate Records Disposition Authorizations (RDAs) for records that are created specifically by that unit of government. Consult the PRB for more information about the RDA creation process.

IV. Using the Schedule:

The WMRS is arranged in five different sections covering the record series created by municipal governments. Some sections are broken down into subsections to provide easier reference. The following is an example of the format used in each section and an explanation of the information found in each column.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Subsection				

- Record Series Title – Descriptive title of the record series. This is a basic title, not necessarily universally used by all municipalities.
- Series Description – Brief overview of the records that are included in the record series.
 - If a specific statute or legal source defines a retention period for the records it is identified in this field.
- Retention – Indicates the minimum time period a record series must be maintained and a description of what initiates the start of the retention clock.
 - **Creation:** Is used when the creation of the record initiates the retention time period. (*Example:* If a RDA existed for ABC Annual Reports, the event might be written as *Creation+ 3 years* meaning an ABC Annual Report must be retained for three years after it is created.)
 - **Fiscal:** Is used if the retention time period is initiated by the end of a fiscal year. (*Example:* RDAs that exist for annual budgets might be written as *Fiscal+ 6 years* meaning a budget would have to be retained for six years after the end of that fiscal year.)
 - **Event:** Is used if a specific event other than Creation or Fiscal initiates the retention time period. (*Example:* A RDA that exists for a housing relocation program has the event written as *Event+ 5 years; Event=Approval Letter for Relocation Plan*". In this scenario, it means all records associated with this RDA have to be retained for five years after the official letter was sent by the state to approve the relocation plan.)

- **Permanent:** Is used if the records need to be maintained permanently by the creating municipality. See the [Guidelines for the Permanent Retention of Records](#).
- General references on retention periods for municipal records are found in Wis. Stat. § 19.21(4)(b), Wis. Stat. § 19.21(6), or Wis. Stat. § 19.21(8).
- **Confidential** – Indicates whether or not records contain information that is required by statute to be kept confidential. See Section V of this guide for more information on confidential records.
- **WHS Notification** – Wis. Stat. § 19.21(4)(a) requires that all municipal public records must be offered for transfer to the Wisconsin Historical Society 60 days prior to their destruction. This field indicates if notification to the Wisconsin Historical Society is required before records can be destroyed. Column will either state NOTIFY or WAIVED.
 - **Waived:** The Wisconsin Historical Society has determined the record series has low historical value and waived the notification period as indicated Wis. Stat. § 19.21(4)(a). Municipalities are free to destroy any waived records without notification once they reach their required retention period.
 - **Notify:** You are required to send written notification to the Wisconsin Historical Society before destruction. Please contact the Wisconsin Historical Society with questions on how to properly notify on the destruction of public records.
 - **N/A:** indicates that the retention is permanent.

Final Disposition:

Municipal records, which have met the retention time outlined in the WMRS, have only two dispositions: Destroy or transfer to the Wisconsin Historical Society. Records that are held beyond their retention period but are not destroyed are still subject to all public records laws.

- **Destruction:** Records identified as “waived” in this schedule may be destroyed without notifying the Wisconsin Historical Society. Local units should dispose of all public records in a manner that ensures they are completely destroyed.
 - If records contain confidential information, or “information that can be associated with a particular individual through one or more identifiers or other information or circumstances” (Wis. Stat. § 19.62(5) including, but not limited to names, addresses, social security numbers, and banking information it must be destroyed confidentially. This means that these records must be disposed of in a way that renders them unreadable and unable to be reconstructed. Typically, this can be achieved by cross cut shredding or pulping. Many organizations disposing of confidential information choose to hire a vendor to handle the process.
 - **Note on records older than 75 years:** the waived designation does not apply. Notification should be given on any records 75 years or older regardless if they have been indicated in the schedule as having been waived.
- **Transfer:** Records identified as “notify” must be offered, in writing, to the Wisconsin Historical Society. Per Wis. Stat. § 19.23(2), the Wisconsin Historical Society assumes title control and public records responsibility of all transferred records. Obsolete municipal records may not be transferred to local historical societies or other repositories because the statutes do not specify other institutions can hold title to public records. Only the records creators and the Wisconsin Historical Society are identified in statutes as being official holders of title.

- Permanent: Records identified as “permanent” have been identified as containing significant historical information and long term business value. Therefore municipalities are responsible for ensuring the long-term preservation of these records. The Wisconsin Historical Society will, in certain circumstances, accept “permanent” records for transfer if the municipality is unable to maintain these records.

Records that have passed their retention period should not be destroyed if any of the following conditions apply:

- Records are required for financial or performance audits either currently underway or known to be planned.
- Records are subject to a “legal hold” because they may be relevant to an existing, pending, or anticipated legal proceeding.
- A related open records request has been received and not completed, or statutorily required time periods have expired.

V. Confidential Records and Personally Identifiable Information (PII)

Confidential Records:

Some records series may contain confidential or restricted access records. The WMRS identifies any record series containing information required by Wisconsin Statute, administrative rule, or other legal authority to be kept confidential or protected from public access. The confidential column is marked “yes” if ANY records in the series may contain confidential information.

Even when specific confidentiality statutes do not apply, application of substantive common law principles through the balancing test considerations under Wis. Stat. § 19.35(1)(a), may affect disclosure of the record under the public records law.

When an individual or an individual’s representative makes an open records request for records containing personally identifiable information about that individual, there is no balancing test, but the disclosure exceptions under Wis. Stat. §19.35(1)(am), must be considered. Wis. Stat. §19.35(1)(am) exceptions include:

- endangering an individual's life or safety;
- endangering the security of a prison, including the security of the population or staff;
- identifying a confidential informant; and
- records collected or maintained in connection with complaints, investigations, or other circumstances that may lead to various administrative or court proceedings.

It is strongly recommended that local governments consult with legal counsel when responding to an open records request. Additional resources on open records requests can be found by visiting the Wisconsin Department of Justice, [Office of Open Government's website](#).

Personally Identifiable Information (PII):

Wisconsin law defines Personally Identifiable Information (PII) as “information that can be associated with a particular individual through one or more identifiers or other information or circumstances” (Wis. Stat. § 19.62(5)). The municipal unit is responsible for evaluating their record series to determine if PII is included. The inclusion of PII does not automatically restrict records, nor does it make them confidential. The confidential column is only marked “yes” in cases where specific statutes restrict access.

VI. Additional Schedules:

Municipal governments should be aware that there are additional schedules that apply to public records. All Wisconsin municipalities have the option of adopting any of the General Records Schedules that have been approved by the PRB. These schedules may cover additional record series not found in the WMRS. In some cases, the WMRS points to the General Schedules for covering some specific records series (such as personnel records). The complete list of approved general records schedules can be found on the [Public Records Board website](#).

Municipalities should also be aware that there are two separate General Records Schedules for the following:

- [Wisconsin School Districts](#)
- [Wisconsin Public Libraries and Library Systems](#)

In addition, municipalities should check the schedule set by the Public Service Commission of Wisconsin (PSC) for Municipal Utilities. A complete list of records and schedules is located in [“Investigation to Consider Proposed Changes to Records Retention Requirements for Electric, Gas and Water Utilities.”](#)

Municipal Court Records are scheduled by [Supreme Court Rule 72](#), which specifies the retention periods for court records and requires municipal courts to give 60 day notice to the Wisconsin Historical Society prior to destroying obsolete records. Furthermore, SCR 72 states that notice is not required for records in which “the historical society has indicated, by blanket waiver, that it has no interest for historical purposes.” The Wisconsin Historical Society has waived the sixty-day notification period for all municipal court records dated 1941 or later. This waiver applies to all municipal courts throughout the state and allows for the disposal of municipal court records without further notification. Municipal Courts are still obligated to maintain the records for the minimum time specified in SCR 72. Please contact the Wisconsin Historical Society if you have any questions regarding Municipal Court Records.

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Administrative Records

Requirements Specific to Administrative Records

The Administrative Records section is organized by the following subsections:

- Administration (general)
- Common Council/Village Board/Town Board
- Emergency Planning
- Human Resources/Personnel
- Legal
- Licenses and Permits
- Municipal Land Ownership
- Municipal Vehicles
- Payroll
- Real Property Titles

This section is intended to provide municipalities with schedules for the most common record series generally grouped under this topic. Municipalities that are in need of schedules for records not covered in this section are encouraged to review and consult the appropriate General Records Schedules listed below:

- [Administrative Records General Schedule](#)
- [Fleet and Aircraft Management Records](#)
- [Human Resources and Related General Schedule](#)
- [Payroll & Related General Schedule](#)

Municipal Court Records are scheduled by [Supreme Court Rule 72](#), which specifies the retention periods for court records and requires municipal courts to give 60 day notice to the Wisconsin Historical Society prior to destroying obsolete records. Furthermore, SCR 72 states that notice is not required for records in which "the historical society has indicated, by blanket waiver, that it has no interest for historical purposes." The Wisconsin Historical Society has waived the sixty-day notification period for all municipal court records dated 1941 or later. This waiver applies to all municipal courts throughout the state and allows for the disposal of municipal court records without further notification. Municipal Courts are still obligated to maintain the records for the minimum time specified in Supreme Court Rule 72. Please contact the Wisconsin Historical Society if you have any questions regarding Municipal Court Records.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Administration Records (general)				
Appointment Files	Materials documenting appointments and nominations to boards, task forces, councils, or other bodies. May include applications; cover sheets, letters of recommendation, resumes, and correspondence.	Event+2 years; Event=End of term	No	Notify
Appointment Files (not selected)	Unsuccessful appointments and nominations to boards, task forces, councils, or other bodies.	Event+1 year; Event=Position filled	No	Waive
Committee Records and Minutes (Excluding Common Council and Zoning Board)	Records of committees, boards, councils, and commissions, other than Common Council. Includes meeting minutes, agenda packets, reports, and resolutions. See Common Council section for retention of Common Council Minutes. See schedule for Zoning Board Records in Public Works Section.	Creation+7 years	No	Notify
Complaints (External)	File related to complaints regarding issues not related to a specific program. Complaints are not otherwise regulated by state or federal requirements.	Event+2 years; Event=Complaint resolution, dismissal or end of litigation	No	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Contracts and Agreements	Any contracts or agreements to which the municipality is a party.	Event+6; Event=End date or cancellation of contract	No	Waive
Correspondence (Senior Level or Elected Official)	Business-related correspondence (paper and electronic) of senior level staff and elected officials.	Event+6 months; Event=Separation from position/end of term Note: Correspondence that relates specifically to a program or project may need to be retained per that particular schedule	No	Notify
Correspondence (General Staff)	Business-related correspondence (paper and electronic) of non-appointed general staff.	Event+1 year; Event=Creation or receipt Note: Correspondence that relates specifically to a program or project may need to be retained per that particular schedule	No	Waive

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Grants	Records relating to grant-funded projects where the agency is the grant recipient or issuer, including the application process, the receipt and expenditure of grant funds, or denial.	Event+4 years; Event=Date of final report or notification of denial	No	Waive
House Number and Address Change File	Provides official control and reference source for city addresses.	Permanent	No	N/A
Internal Policies and Procedures	Established departmental policies and procedures. Note: May also be called administrative practices or directives or executive directives.	Event+7 years; Event=Date the policy/ procedure is superseded or made obsolete	No	Waive
Memorandums of Understanding (MOU) & Service Level Agreements (SLA)	Agreements between government units. Sometimes define agreements between a large government unit's separate divisions or bureaus.	Event+4 years; Event=Ending date of the MOU or SLA.	No	Waive
Notice of Removal of Human Corpse	Form for the removal of a human corpse if death occurs in a hospital, nursing home, or under hospice care at any location.	Event+2 months; Event=Date of death	No	Waive

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Oath of Office	Elected or appointed municipal officers may be required to take, and file in writing, an official oath within ten days after receiving notice of election or appointment.	Event+5 years; Event=End of term	No	Waive
Open Records Requests and Responses	Records relating to regular and reformulated, repetitious, systematic or continuing requests by individuals, groups or organizations for access to general information under the provisions of the Wis. Stats. §§ 19.35-19.37.	Event+3 years; Event=Response provided	No	Waive
Organizational Chart	Repository of the official organizational structure of offices.	Event; Event=Superseded	No	Waive
Organizational Planning	Includes division and unit strategic business and operational planning files such as, but not limited to, final plan and significant work papers.	Event+7 years; Event=Completion of plan	No	Notify
Petitions	Petitions submitted to municipalities for improvements or changes to existing municipal services/structures.	Event+7 years; Event=Petition approved or denied	No	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Press/News Releases	Information about municipality programs and events.	Creation+3 years	No	Notify
Proclamations	Proclamations issued by the mayor, commissioner, or elected executive on behalf of the municipality.	Event+1 year; Event=End of elected representative's final term	No	Notify
Reports (Annual)	Annual reports produced by all departments and programs.	Event+7 years; Event=Date of issue	No	Notify
Reports (Monthly)	Monthly reports of divisions/committees.	Creation+3 years	No	Waive
Subject Files (Senior Level or Elected Official)	Subject files (paper and electronic) of senior level staff such as department heads and elected officials.	Event+6 months; Event=Separation from position/end of term	No	Notify

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Common Council/Village Board/Town Board				
Affidavits of Publication	Records providing proof of publication for legal notices as required by law. (Note: See Wis. Stat. § 985.12 for more information on proof of publication).	Event+7 years; Event=Date of publication	No	Waive
Audio Tapes	Recordings of meetings used to produce minutes. Authority provided by Wis. Stat. § 19.21(7).	Event+90 days; Event=Date the minutes have been approved and published	No	Waive
Minutes (Common Council)	Official minutes of the Common Council/Village Board/Town Board.	Permanent	No	N/A
Ordinances	Official ordinances and any ordinance books kept by municipalities.	Permanent	No	N/A
Resolutions	Official records pertaining to resolutions passed by municipalities.	Permanent	No	N/A

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Emergency Planning¹				
Continuity of Government Operational Plan and Documentation	Agency official plan and documentation of the Continuity of Operations Plan/Continuity of government plan.	Event; Event=superseded by revised plan	No	Waive
Critical Incident Management Plans	Critical incident management plans, local site security plans, local emergency action plans, life safety, and other similar documents.	Event+3 years; Event=superseded by revised plan	No	Waive
Disaster Recovery Records	Records created during the disaster recovery process.	Event+3 years; Event=Date recovery effort is complete ²	No	Waive
Human Resources/Personnel				
Grievance Case File	Records of grievances filed by employees.	Event+7 years; Event=Date grievance is closed	Yes ³	Waive

¹ No specific statutes restrict the records in this series. However, the balancing test per Wis. Stat. § 19.35(1)(a) should be applied prior to release.

² Note: When Federal Grant money is involved, the retention is 3 years from the date of the final Financial Services Report.

³ No specific statutes restrict this type of record. However, the balancing test per Wis. Stat. § 19.35(1)(a) should be applied prior to releasing this type of record. Personnel files may contain patient health records which may be protected by Wis. Stat. § 146.82 and/or the Health Insurance Portability and Accountability Act (HIPAA).

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Personnel Files	Documents employee personnel actions during the employment of the employee. Applies to ALL employees.	Event+7 years; Event=End of employment/service	No ⁴	Waive
Legal				
Attorney Opinions	Municipal attorney opinions given to answer specific questions regarding the interpretation and application of statutes and ordinances, or other legal matters.	Permanent	No ⁵	N/A
Case Files	Files include, but are not limited to, pleadings and legal arguments, evidence, research, orders, legal summons and subpoenas issued. ⁶	Event+7 years; Event=Close of case	No ⁷	Notify on historically significant cases only ⁸

⁴ No specific statutes restrict this type of record. However, the balancing test per Wis. Stat. § 19.35(1)(a) should be applied prior to releasing this type of record. Personnel files may contain patient health records which may be protected by Wis. Stat. § 146.82 and/or the Health Insurance Portability and Accountability Act (HIPAA).

⁵ Records may contain material protected by Attorney-Client Privilege Wis. Stat. § 905.03.

⁶ Records may contain the client file with information pertaining to expenses, attorney notes, medical records, government agency filings, discovery such as requests for production of documents, deposition transcripts, and evidence.

⁷ Records may contain material protected by Attorney-Client Privilege Wis. Stat. § 905.03.

⁸ Historically significant case files include those that have established legal precedents; cases that received widespread attention from the public and news media; and cases recognized for their uniqueness. Examples of such cases include, but are not limited to, major civil rights cases, major labor relations cases, major environmental cases, cases dealing tribal governments and treaty rights, major cases with constitutional implications, and cases related to major prosecutions of public officials.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Licenses and Permits				
License Applications	Includes license applications (approved and unapproved) and license stubs. Includes all non-alcohol related licenses including, but not limited to, non-intoxicating beverages, soda water beverages, food handling and sales, mobile home park licenses, restaurant, retail dairy products, pet, and animals. Also includes permits for the excavation of streets by private utility companies.	Creation+3 years	No	Waived
Liquor and Beer Licenses	Includes license applications (approved and unapproved) and license stubs. Authority provided by Wis. Stat. § 125.04(3)(i).	Creation+4 years	No	Waived
Permits	Permits for public space usage. Includes, but not limited to, burning, street usage, and parking permits. NOTE: See Public Works Section for retention of building permits.	Creation+5 years	No	Waived
Permits (septic tanks)	Permit for a septic tank. The permit records the location and ownership of the tank.	Permanent	No	N/A

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Municipal Land Ownership				
Land Titles, Conveyances and Easements	Documentation for municipal owned land. Also includes any legal rights granted to others that relate to municipal owned land.	Permanent	No	N/A
Sales of Facilities and/or Land (Case Files)	Includes appraisals and related valuations. Projects where a municipality plans or actually sells either facilities and/or land assets.	Event+6 years; Event=date of the completion of the transaction	No	Waived
Municipal Vehicles				
Motor Vehicle Control and Assignment Records	Documentation of agency motor vehicle assignments to employees. Includes completed documentation on reservations for pool cars, individual trips, driver profiles, check-in and checkout logs.	Event+1 year; Event=date the vehicle is disposed	No	Waived
Motor Vehicle and Heavy Equipment Maintenance Records	Records documenting service and repair orders to motor vehicles. These records normally include maintenance orders, logs, fiscal documents, such as requisitions or purchase orders for parts or services, vehicle warranties, operation and repair manuals and parts lists.	Event+1 year; Event=date the vehicle is disposed	No	Waived

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Vehicle Use Agreements	Agreements between individuals and municipalities required before driving a municipal owned vehicle.	Event+1 year; Event=termination of agreement or employment	No	Waived
Vehicle Inspection Reports	Inspections of municipal vehicles.	Event+1 years; Event=date the vehicle is disposed	No	Waive
Payroll⁹				
Employee Payroll & Benefit File	Includes various documents that are maintained throughout the employee's term of employment.	Event+7 years; Event=Employee retirement, transfer or termination	No	Waived
Monthly and Quarterly Payroll Reports	Includes, but is not limited to, quarterly report of federal income tax withheld; quarterly report, payroll summary; state's quarterly report of wages paid, and monthly memorandum report.	Event+5 years; Event=Report Issued (provided record has been audited)	No	Waived

⁹ No specific statutes restrict this record series. However, the balancing test per Wis. Stat. § 19.35(1)(a) should be applied prior to releasing this type of information.

Record Series Title	Series Description	Retention	Confidential	WHS Notification
Payrolls and Payroll Registers	Payroll listings showing gross and net pay, as well as deductions for state employees. Referred to on questions of back pay and income taxes.	Creation+4 years	No	Waived
Real Property Titles				
Title Documentation	Records documenting the title of land owned by the municipality including the abstract and certificate of title, opinions of title, and title insurance policies.	Permanent	No	N/A

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Cemetery Records

Requirements Specific to Cemetery Records

Municipalities and towns are required to assume ownership of abandoned private cemeteries. Cemeteries are considered abandoned if the cemetery association or other organization that once cared for the cemetery no longer exists and no legal owner can be found (Wis. Stat. § 157.115(1)).

- The municipality or town must care for the cemetery to the same standards as other municipal or town cemeteries.
- Six or more residents of your town or municipality may petition the circuit court to require that the town or municipality assume ownership or move any graves to another location.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Annual Report and Documentation	Includes the annual report to the cemetery board and the records needed to prepare the report. Authority provided by Wis. Stat. § 157.62(4).	Permanent	No	N/A
Care Funds	An accounting of amounts deposited in, amounts withdrawn from, other income accruing to, and the balance at the end of the reporting period of care funds of the cemetery, including the funds in Wis. Stat. § 157.11(9g)(a), Wis. Stat. § 157.12(3), and Wis. Stat. § 157.125. Including records that show, for each deposit, the name of the purchaser or beneficiary of the contract relating to the deposit and the item purchased. Authority provided by Wis. Stat. § 157.62(4).	Permanent	Yes Confidential per Wis. Stat. § 157.62(2)(c)	N/A

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Contract for Sale	Copy of each contract for the sale of a cemetery lot, mausoleum space, or cemetery merchandise. Authority provided by Wis. Stat. § 157.62(4).	Event=3 years; Event=After all of the obligations of the contract have been fulfilled	No	Waive
Grave Registration Records	Records that describe who is buried, the date of death, interment and location of the remains.	Permanent	No	N/A
Preneed Trust Funds	An accounting of amounts deposited in, amounts withdrawn from, income accruing to, and the balance at the close of the reporting period of any preneed trust funds of the cemetery. Including records that show, for each deposit, the name of the purchaser or beneficiary of the contract relating to the deposit and the item purchased. Authority provided by Wis. Stat. § 157.62(4).	Event+15 years; Event=Date of the deposit or withdrawal	Yes Confidential per Wis. Stat. § 157.62(2)(c)	Waive
Reburial of Human Remains	Includes records confirming an attempt to notify individuals specified in Wis. Stat. 157.112(3)(b)1.-4. when none of the individuals specified are available. Authority provided by Wis. Stat. § 157.112(3m).	Permanent	No	N/A

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Report for Final Disposition	<p>Report for final disposition completed by the funeral director or other person preparing the body for burial or other final disposition. The reports are filed with the local register, but may also be filed with the cemetery to serve as a record of interment.</p> <p>Authority provided by Wis. Stat. § 135.06(1)(a)(1).</p>	Permanent	No	N/A

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Community Development/Public Services

Requirements Specific to Community Development/Public Services

The Community Development/Public Services section is organized by the following subsections:

- Housing Program
- Outreach
- Parks
- Public Transportation
- Sanitation

This section is intended to provide municipalities with schedules for the most common record series generally grouped under this topic. Municipalities that are in need of schedules for records not covered in this section are encouraged to review the [County General Schedule](#) for reference on scheduling similar records. The County General Schedule cannot be adopted by municipalities for use, but the schedules can be used for creating record schedules through municipal ordinances.

Municipalities that have records pertaining to Public Health should use the County General Schedule to create ordinances to schedule those records.

The retention of public transportation surveillance recordings is covered by the schedule for [surveillance recordings](#) listed under the subsection Maintenance and Operations in the Public Works section.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	Waive/Notify
Housing Program				
Program Files	Correspondence, breakdown of projects, HUD regulations, and supporting files.	Event+7 years; Event=Audit	No	Notify
Outreach				
Public Program Files	Outreach programs for municipality sponsored programs.	Event+7 years; Event=Superseded or end of program, whichever is first	No	Notify
Parks				
Park Master Plan	Master plans for parks and park systems. May include maps, drawings, photographs, and reports.	Superseded	No	Notify
Program Files	Records relating to programs, events, and activities.	Creation+3 years	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	Waive/Notify
Reservation Requests, Rental Agreements, Use Permits, and Contracts	Permits, agreements, and contracts for the use of parks, shelters, and facilities.	Event+3 years; Event=Date of reservation	No	Waived
Supervisors Daily Report of Work Completed	Summarizes progress made on a particular job, noting the time required, employees assigned and vehicles used.	Creation+2 years	No	Waived
Public Transportation				
Accessible Boarding Reports	Reports documenting the accessibility of vehicles.	Creation+5 years	No	Waive
Americans with Disabilities Act (ADA) Customer Eligibility Files	Files determining the eligibility of customers for ADA transit programs.	Event+6 years; Event=Termination of service or participation by customer	Yes Patient health information may be protected by Wis. Stat. § 146.82	Waive
Bus Route Schedules and Timetables	Documentation of transit schedules, timetables, routes, and route history.	Event+3 years; Event=Superseded	No	Waive

Record Series Title	Series Description	Retention and Disposition	Confidential	Waive/Notify
Dispatch Files	Boarding and alighting, extra board weekly projections and assignments, daily work schedules, and bid mark-ups.	Creation+7 years	No	Waive
Fare Information Files	Research, background, studies, and other materials used to determine fares.	Creation+7 years	No	Waive
Operation Reports	Daily, weekly, or other periodic reports summarizing transit system operations and ridership and lost and found reports.	Creation+3 years	No	Waive
Operator Assignment Records	Documentation of assignment of individual operators to routes and shifts.	Creation+3 years	No	Waive
Sanitation				
Composting Regulations	Documents pertaining to the disposal of yard waste.	Event+7 years; Event=superseded	No	Waive

Record Series Title	Series Description	Retention and Disposition	Confidential	Waive/Notify
Curbside Recycling Program	Documentation of the curbside recycling program including policies, procedures, and administration of the program.	Event+7 years; Event=superseded	No	Waive
Drop Off Site/Recycling Yard Waste	Site operation files and records.	Creation+7 years	No	Waive
Household Hazardous Waste Collection Center	Records related to the collection and disposal of paints, corrosives, flammables, toxics, used motor oil, and car/truck batteries.	Creation+30 years	No	Waive
Landfill/Garbage Dump Sites	Location of any fill, records of materials deposited, cover materials used, reports of leachate and methane leakage and treatment, source of fill materials, (household, commercial) source of cover materials, and inspection reports.	Permanent	No	N/A

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Election Records

Requirements Specific to Election Records

Additional information regarding election records is available through the Wisconsin Election Commission. Municipalities are encouraged to review the [Election Administration Manual](#) available on the Wisconsin Elections Commission Website for more in-depth information about managing election related records. Retention times in this section that are not specifically stated in Wisconsin Statutes are taken from the *Election Administration Manual*.

- Federal Election records must be maintained for 22 months as specified in Wis. Stat. § 7.23(1)(f).
- Recounts or Pending Litigation are subject to a longer retention pending litigation or recounts as specified in Wis. Stat. § 7.23(2).
- All other material not described below are identified by Wis. Stat. § 7.23(1)(k) as having a retention period of 90 days after the election.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Ballots and Equipment				
Applications for Absentee Ballots (Federal Elections)	Includes copies of proof of identification when submitted with application. Authority provided by Wis. Stat. § 7.23(1)(f).	Event+22 months; Event=Election ¹⁰	No	Waived

¹⁰ All materials and documentation associated with a federal election must be retained at least 22 months after the election. Federal elections include those for the office of President of the U.S., U.S. Senator, and U.S. House of Representatives (Wis. Stat. § 7.23(1)(f)).

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Applications for Absentee Ballots (State, County, Local Elections)	Includes copies of proof of identification when submitted with application. Authority provided by Wis. Stat. § 7.23(1)(k).	Event+90 days; Event=Election	No	Waived
Ballots (Federal Elections)	Federal election ballots. Authority provided by Wis. Stat. § 7.23(1)(f).	Event+22 months; Event=Election	No	Waived
Ballots (State, County, Local Elections)	State, county, local offices. Authority provided by Wis. Stat. § 7.23(1)(h).	Event+30 days; Event=Election	No	Waived
Ballots (Unused and related Materials)	Only applies to unused ballots and materials. Authority provided by Wis. Stat. § 7.23(1)(a).	Event+3 business days; Event=Completion of all election canvasses ¹¹	No	Waived

¹¹ Materials must be retained in event a petition for recount has been filed.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Detachable Recording Units	Data storage devices used in electronic voting equipment. Authority provided by Wis. Stat. § 7.23(1)(g).	Event+21 days; Event=Election ¹²	No	Waived
Detachable Recording Units (Primary Elections)	Data storage devices used in electronic voting equipment. Authority provided by Wis. Stat. § 7.23(1)(g).	Event+14 days; Event=Election ¹³	No	Waived
Campaign				
Campaign Finance Reports	Financial disclosure reports filed by candidates during election campaigns. Authority provided by Wis. Stat. § 7.23(1)(d).	Event+6 years; Event=date of receipt	No	Waived

¹² Before clearing or erasing the units or compartments, a municipal clerk shall transfer the data contained in the units or compartments to a disk or other recording medium which may be erased or destroyed 22 months after the election to which the data relates. The requirement to transfer data does not apply to units or compartments for use with tabulating equipment for an electronic voting system that was approved for use prior to January 1, 2009, and that is not used in a federal election.

¹³ Before clearing or erasing the units or compartments, a municipal clerk shall transfer the data contained in the units or compartments to a disk or other recording medium which may be erased or destroyed 22 months after the election to which the data relates. The requirement to transfer data does not apply to units or compartments for use with tabulating equipment for an electronic voting system that was approved for use prior to January 1, 2009, and that is not used in a federal election.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Campaign Registration Statements	Statements filed by candidates for public office. Includes Notification of Non-candidacy for reelection forms. Authority provided by Wis. Stat. § 7.23(1)(d).	Event+6 years; Event=termination issued by the registrant	No	Waived
Reports and Lists				
Official Canvassers Statements	Prepared statement showing the results of each election. Authority provided by Wis. Stat. § 7.23(1)(i).	Event+10 years; Event=election	No	Waived
Election Notices	Includes proofs of publication and correspondence filed in connection with such notices. Authority provided by Wis. Stat. § 7.23(1)(j).	Event+1 year; Event=Election	No	Waived
Election Notices (Federal Elections)	Includes proofs of publication and correspondence filed in connection with such notices. Authority provided by Wis. Stat. § 7.23(1)(j).	Event=22 months; Event=Election	No	Waived
Election Voting and Registration Statistics Reports	Reports filed by municipal clerks on registration, voting, and absentee voting. Authority provided by Wis. Stat. §§ 6.275-6.276.	Event+22 months; Event=Election	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Ineligible Elector Registrations	Elector registrations deemed ineligible for voting. Status and reasons for ineligibility should be noted. Authority provided by Wis. Stat. § 7.23(1)(c).	Event+4 years; Event=When deemed ineligible	No	Waived
Poll (Voter) Lists	List compiled by election officials on election day showing the names and addresses of electors who actually cast votes in an election defined in Wis. Stat. § 5.02(14). Authority provided by Wis. Stat. § 7.23(1)(e).	Event+22 months; Event=Election	No	Waived

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Finance Records

Requirements Specific to Finance Records

The Finance section is organized by the following subsections:

- Budget
- Fiscal
- Purchasing

Municipalities are encouraged to adopt the following general schedules in instances where this schedule does not adequately provide coverage for all types of records that could be created:

- [Budget and Related General Record Schedule](#)
- [Fiscal & Accounting Related Records General Schedule](#)
- [Purchasing & Procurement General Schedule](#)

Note: Records in this series may contain confidential or restricted information. Even when specific confidentiality statutes do not apply, application of substantive common law principles through the balancing test considerations under Wis. Stat. § 19.35(1)(a), may affect disclosure of the record under the public records law. Please consult [Section V: Confidential Records and Personally Identifiable Information \(PII\)](#) of the Introduction for more information on this topic.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Budget				
Approved Annual Operating Budget	Records related to establishing the base level agency annual operating budget each fiscal year.	Fiscal+6 years	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Audit Reports	Reports that evaluate the financial holdings of the municipality.	Event+3 years; Event=Final report issued	No	Waived
Budget Documents/ Development	Records include final budget requests (forms or their equivalents), justifications/analysis, policy papers, related correspondence, and requests for information.	Fiscal+6 years	No	Waived
Final Budget Submittal	The final budget document for the municipality.	Fiscal+6 years	No	Waived
Municipal Borrowing				
Bond Records	All records associated with municipal bonds. Also includes the bond register, bond payment register, and any certificates of destruction when the bond agent has been authorized to destroy cancelled bonds, coupons, and promissory notes.	Event+7 years; Event=Bond issue expires or following payment of all outstanding matured bonds/notes/coupons, whichever is later	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Payments and Receipts				
Bank Statements/ Reconciliations	Statements received from institutions holding the municipality's funds.	Creation+7 years	No	Waived
Cashbook	Overall record accounting for receipts and disbursements, usually for fiscal or calendar year.	Event+7 years; Event=Audit	No	Waived
Collection & Disbursement Reports	Reports showing the amounts collected, amounts retained by county/local government, and portion sent to state.	Event+3 years; Event=Transaction date	No	Waived
Credit Card Receipts or Information Received from Sales	Credit card receipts and related documentation associated with credit card transactions.	Event+3 years; Event=Transaction date	No	Waived
Financial support records	Records used in reconciling bank statements and verifying expenditures. Includes, but not limited to, credit/debit notices, cash reconciliations, and deposit stubs.	Event+1 year; Event=Audit	No	Waived

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Issued Checks	Checks issued by the municipality that are outstanding or have been cleared by the bank.	Creation+7 years	No	Waived
Purchasing				
Contract and Request for Bid /Proposal File	Records pertaining to the procurement of all commodities and services which may require a contract. This includes both successful and unsuccessful bids.	Event+6 years; Event=End date of resulting contract or cancellation date of contract or bid/proposal	Yes ¹⁴ Some information may qualify for Trade Secret protection per Wis. Stat. § 19.36(5).	Waived
Vendor Performance Files	Documentation of vendors and contractors who fail to meet the terms and specifications of purchasing contracts.	Event+6 years; Event=End of contract	No	Waived

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¹⁴ Some information may qualify for other legal protection such as copyright, patent, trademark or licensing. It is possible some vendors may identify information as confidential that is not actually protected by law.

Public Works

Requirements Specific to Public Works

Records in the Public Works section are arranged under the following subsections:

- Building Inspection
- Engineering
- Maintenance and Operations
- Planning and Zoning
- Utilities

The Public Works section is intended to provide municipalities with schedules for the most common record series generally grouped under this topic. Municipalities that are in need of schedules for records not covered in this section are encouraged to review and consult the appropriate General Records Schedules listed below:

- [Facilities Management and Related Records](#)

Wis. Stat. § 19.21(4)(b) defines the minimum retention cities, villages, and towns may set for water stubs, receipts of current billing, and customer's ledgers of any municipal utility as 2 years. In addition, municipalities should check the schedule set by the Public Service Commission of Wisconsin (PSC) for Municipal Utilities. A complete list of records and schedules is located in "[Investigation to Consider Proposed Changes to Records Retention Requirements for Electric, Gas and Water Utilities.](#)"

Schedules specific to Police/First Responder records are not included in the WMRS. Consult the County General Schedule for records schedules for similar records which can be used as a basis for the creation of schedules and/or ordinances.

Surveillance recording schedule applies to municipally operated security footage for public buildings, street cameras, and public transportation. The schedule **does not apply** to footage recorded by police body cameras, patrol dashboard cameras, or any similar police recording device.

Municipalities should have adequate and clear procedures in place that explain the proper handling and destruction of surveillance recordings. Clear communication with appropriate municipal personnel will help to ensure that the record is not destroyed prematurely and public requests and/or any legal or program needs are met in a timely manner.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Building Inspections				
Building Inspection Records	Summary of inspection history of a particular property. Records include original building permit, site plans, certificate of occupancy, conditional use documents, comprehensive design reviews, and violations for both residential and commercial structures. Also includes inspection of plumbing, electrical, ventilation, heating, and air conditioning.	Event+1 year; Event=Life of building	No	Waived
Building Plan Review and Inspection	Conditionally approved building plans, calculations, and correspondence. Authority provided by Wis. Admin. Code § SPS 361.60(5)(f)1.b. Note: applies to certified municipalities only (see Wis. Admin. Code § SPS 361.60(2)). ¹⁵	Event+4 years; Event=Construction completed	No	Waived

¹⁵ Note: Refer to Wis. Admin. Code § SPS 361.60(5) for detailed information on the specific types of buildings that first class, second class, and other municipalities are authorized by the Department of Safety and Professional Services to review. Prior to applying this schedule, the Municipality must review and take the steps outlined in Wis. Admin. Code § SPS 361.60.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Building Plans: Residential 1 and 2 Family Dwellings	Includes architectural, design specs, structural and utility plans submitted for inspection review. Authority provided by Wis. Admin. Code § SPS 320.10(6)(a)2.	Event+4 years; Event=Construction completed	No	Waived
Building Inspection: Residential 1 and 2 Family Dwellings	Applications forms, correction orders, correspondence and inspection records. Authority provided by Wis. Admin. Code § SPS 320.10(6)(a)3.	Event+ 7 years; Event=Construction completed	No	Waived
Code Compliance Inspection Reports	Reports completed during field investigations to determine if buildings and system installations comply with the specifications of appropriate codes.	Permanent	No	N/A
Engineering				
Airport Improvement Petition File	Material submitted to the Department of Transportation when a municipality wants to make an improvement to the airport. Records may include public hearing records, briefs, reports and recommendations, and correspondence.	Event+7; Event=petition submitted to DOT	No	Waived
Airport Master Plan	The Airport Master Plan provides information about the condition of the airport and projects development for the next 20 years.	Event+20 years; Event=new plan issued	No	Notify

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Construction Plans: Final As-Built Projects	Final as-built plans and original drawings for public for buildings, streets, sewers, sidewalks, etc.	Event; Event=life of structure	No	Waived
Construction Plans: Final As-Built Projects (Historically Significant)	Use for historically significant projects.	Event; Event=life of structure	No	Notify
Environmental Assessment & Impact Statements	Official copies of environmental assessments, impact statements and related documentation related to municipal construction projects. ¹⁶	Event+6 years; Event=Termination of municipal ownership of the land	No	Notify
Maps: Construction and Topographical	May include maps covering environmental impact/changes, development of specific areas, and the impact on public infrastructure (utilities, roads, sidewalks).	Permanent	No	N/A

¹⁶ May include: environmental assessment reports and drafts, environmental impact statements (draft and final), legal notices, comments from the public, DNR and others, related correspondence and supporting materials.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Project Records	All documents pertaining to a project including, design and construction contracts, proposed and approved amendments to all contracts, bidding plans and specifications, details on materials used on each project, and all other related project materials. Use for buildings, streets, sewers, sidewalks, etc.	Event+10 years; Event=Date project is completed	No	Waived
Project Records (Historically Significant)	Use for historically significant projects.	Event; Event=Life of structure	No	Notify
Maintenance and Operations				
American with Disabilities Act (ADA) Facility Reviews	Records cover ADA inspections, investigations, complaint investigations, facility logs and reports regarding ADA compliance relating to facilities and structures.	Event+6 years; Event=Close of review or audit	No	Waived
Asbestos and Hazardous Material and Environmental Remediation Case File	Project files on asbestos abatement and hazardous materials and environmental remediation projects at state owned buildings. ¹⁷	Event+30 years; Event=Completion of the project	Yes ¹⁸	Waived

¹⁷ OSHA 29CFR 1926.1101 governs asbestos abatement projects. The records include medical surveillance records for certain people who wear protective equipment performing asbestos abatement work.

¹⁸ Patient health care records in this series are confidential per Wis. Stat. § 146.82.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Building Maintenance: Equipment Repair and Service Records	Documents the installation, maintenance, service and history of equipment commonly used to maintain facilities.	Event+1 month; Event=Removal and disposal of equipment	No	Waived
Building Lease Files	Files on leased facilities.	Event+7 years; Event=End of lease	No	Waived
Maps	Series may document road locations or surfaces, zoning information, parks, flood plains, soils, or parcel boundaries. This record series may also include indexes to maps. ¹⁹	Permanent	No	N/A
Physical Plant Monitoring and Inspection Reports	Records documenting the operation of all facets of facilities: VAC; plumbing, mechanical, electrical, structural as well as special monitoring of building components.	Creation+6 years	No	Waived

¹⁹ Copies of maps that are retained by local government offices after originals have been sent to other government units for retention may be destroyed 90 days after they have been transferred. An example of this are copies of certified survey maps created by local units and then sent to the county register of deeds office for retention under Wis. Stat. § 236.34(2).

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Profile and Grade Books	Documentation of landscape and features.	Permanent	No	N/A
State Highway Aids Program Records	Records of state aid pertaining to road maintenance.	Creation+7 years	No	Waived
Street and Sidewalk Operations File	Documentation of the performance of tasks related to street and sidewalk maintenance. This may include solid waste management, street cleaning, repairs, snow removal, and garbage collection.	Creation+7 years	No	Waived
Surveillance Recordings	Monitoring and surveillance recordings for public buildings, street cameras, and public transportation. ²⁰	Event+120 days ²¹ Event=Date of recording (Note: Recordings may be subject to longer retention. See footnote for more information.) ²²	No	Waive

²⁰ The schedule does not apply to footage recorded by police body cameras, patrol dashboard cameras, or any similar police recording device.

²¹ 120 days is the time within which a claim may be filed against a governmental body as defined in Wis. Stats. § 893.80.

²² Surveillance recordings that are required for any legal or programming purpose (such as open records requests, claims, case file, or litigation holds) must be retained in accordance with any applicable records schedules and/or have completed their legal or programming requirements.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Planning and Zoning				
Aerial Photographs	Aerial photographs used for planning and map creation.	Event; Event=Superseded	No	Notify
Annexation Records	Incorporation records such as petitions, hearing testimony and exhibits, court orders, notices, resolutions, and related correspondence. ²³	Permanent	No	N/A
Comprehensive Growth and Development Plan	Provides general goals, objectives, policies and implementation recommendations to guide the future growth and development of the city.	Event+14 years; Event=Superseded by new plan	No	Notify
Conditional Use Permits	Applications and related documents for a conditional use permit. Applications include site plan, applicate statement, and evidence evidence/documentation. This series may also include public hearing notice, reports, public hearing documentation, and decision.	Event+7 years; Event=termination of conditional use permit	No	Waived

²³ Records cover proposed incorporations of town areas into cities and villages pursuant to Wis. Stat. § 66.0201 - § 66.0209, and municipal consolidations of towns with cities and villages pursuant to Wis. Stat. § 66.0229.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Easements	Grants of easement to the municipality.	Permanent	No	N/A
Final Plats	A map showing the divisions of a piece of land, this series includes vacation or alterations of plats, annexation plats, and final subdivision plats.	Permanent	No	N/A
Preliminary Plats	Created during the development of subdivisions.	Event; Event=Superseded by final plat	No	Waived
Property Survey Records	Includes field notes, benchmark books, and section corner monument logs.	Permanent	No	N/A
Zoning Appeals, Approved	Material submitted to appeal a zoning decision. May include maps, rezoning application, written local description of the proposed zoning boundaries, and drawings of the boundaries. Also includes public hearing records.	Permanent	No	N/A

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Zoning Appeals, Unapproved	Material submitted to appeal a zoning decision. May include maps, rezoning application, written local description of the proposed zoning boundaries, and drawings of the boundaries. Also includes public hearing records.	Event+7 years; Event=Final appeal is closed	No	Notify
Zoning Board and Zoning Board of Appeals Meeting Material	Agendas, minutes, reports, plans, and other material submitted to the Zoning Board, and/or Zoning Board of Appeals.	Permanent	No	N/A
Zoning Ordinance	The text of the zoning ordinance spells out uniform rules that apply to each zoning district including: uses of the land (permitted, conditional and prohibited uses), dimensional standards (lot size, frontage, setbacks, building height, bulk, floor area), and the density of development. Authority provided by Wis. Stat. § 60.61.	Permanent	No	N/A
Zoning, Rezoning Files	May include, but is not limited to, maps, rezoning application, written local description of the proposed zoning boundaries, and drawings of the boundaries. Also includes public hearing records.	Permanent	No	N/A
Zoning Variance Files	Records related to area and use variances. Documentation submitted by landowners to secure a variance to the zoning ordinance.	Permanent	No	N/A

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Utilities ²⁴				
Abandoned Mains and Services As-Built	Records may include final designs and location maps. Includes plans of private sewer and water systems.	Permanent	No	N/A
Excavation Plans of Private Utilities	Plans submitted by utilities needing to excavate to develop, expand, or repair utility lines.	Permanent	No	N/A
Inspections	Records documenting the inspection of water and sewer lines.	Permanent	No	N/A
Sewer Inspection Records	Indicates problems such as cracked or broken pipes, improper alignment, or loose lateral connections.	Event; Event=Superseded	No	Waived

²⁴ Wis. Stat. § 19.21(4)(b) defines the minimum retention cities, villages, and towns may set for water stubs, receipts of current billing, and customer's ledgers of any municipal utility is 2 years. Local governments should also consult the schedule set by the PSC for Municipal Utilities. A complete list of records and schedules is located in "Investigation to Consider Proposed Changes to Records Retention Requirements for Electric, Gas and Water Utilities."

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Water and Sewer Main Break Records	A record documenting the history of breaks in water and sewer main lines.	Permanent	No	N/A
Water, Storm, and Sanitary Sewer Main Maps	Maps providing the location of water, storm, and sanitary sewer mains. Also provides information about the depth, slope, size and composition of these features.	Permanent	No	N/A

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Revenue Records

Requirements Specific to Revenue Records

Records in the Revenue section are arranged under the following subsections:

- Assessment
- Board of Review
- Special Assessment
- Tax Calculation and Collection

The Revenue section is intended to provide municipalities with schedules for the most common record series generally grouped under this topic. Municipalities that are in need of schedules for records not covered in this section are encouraged to review the [County General Schedule](#) for reference on scheduling similar records. The County General Schedule cannot be adopted by municipalities for use, but the schedules can be used for creating record schedules through municipal ordinances.

Final real property assessment rolls have a retention period of 15 years and may be destroyed after that time has lapsed. However, Wis. Stat. § 59.52(4)(c)3 states that no assessment roll containing forest crop acreage may be destroyed without the prior approval of the secretary of the Department of Revenue. Municipalities should assume that assessment rolls from rural areas include forest crop acreage and that this provision applies to their assessment rolls. Municipalities should contact the Wisconsin Department of Revenue, Local Government Services Bureau for more information. This step is in ADDITION TO notifying the Wisconsin Historical Society of the upcoming record destruction.

Note: Notification should be given on any records 75 years or older regardless if they are marked waived.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Assessment				
Assessor' Final Reports	Documents yearly changes to master property record and personal property returns. Final report is filed with DOR.	Event+5 years; Event=Final report filed with DOR	No	Waive
Cadastral Maps	Includes any plats, assessor's plats, certified surveys, or aerial photographs used in determining taxable boundaries.	Permanent	No	N/A
Final Assessment Rolls	Both real and personal property rolls.	Creation+15 years (Provided no Forest Crop Acreage is recorded) ²⁵	No	Notify
Master Property Records	Details the appraisal of real property, based on the field inspections of the assessor.	Event+5 years; Event=Life of structure	No	Notify

²⁵ Wis. Stat. § 59.52(4)(c)3 states that no assessment roll that contains forest crop acreage may be destroyed without the prior approval of the secretary of revenue. Notification to the Wisconsin Historical Society is still required before approved assessment rolls can be destroyed.

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Notice of Increased Assessment	Notices sent to property owners informing them of increases on assessment.	Creation+7 years	No	Waive
Taxation Exemption Reports	Reports filed by individuals who own property exempt from personal property tax under Wis. Stat. § 70.11. The reports are submitted to the clerk of the taxation district. Authority provided by Wis. Stat. § 70.339.	Creation+10 years	No	Waive
Personal Property Statements	Statements filed with local assessor declaring taxable personal property.	Creation+5 years	Yes Confidential per Wis. Stat. § 70.35(3)	Waive
Board of Review				
Form of Objection	Objections submitted by taxpayers. Includes written objections and all other material submitted to the board of review.	Event+7 years; Event=Final action of Board of Review or completion of appeal	No	Waive
Minutes	Record of all proceedings of the board of review. Authority provided by Wis. Stat. § 70.47(5).	Creation+7 years	No	Notify

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Notice of Determination	Final decisions sent to property owners. Authority provided by Wis. Stat. § 70.47(12).	Event+7 years; Event=Final action of Board of Review or completion of appeal	No	Waive
Proceedings	Includes audio recordings and any transcripts of board of review proceedings, along with any notes taken by clerk. Authority provided by Wis. Stat. § 70.47(8)(f).	Event+7 years; Event=Final action of Board of Review or completion of appeal	No	Waive
Special Assessments				
Final Resolution	Final authorization of special assessments. Authority provided by Wis. Stat. § 66.0703(8)(d).	Permanent	No	N/A
Payment Register	Record of the receipt of scheduled payments.	Event+7 years; Event=Final collection of payments	No	Waive
Preliminary Resolutions	Issued by municipal district describing the purpose of the project, calculations, limits of assessment district, and number of installments to be paid. Authority provided by Wis. Stat. § 66.0703(4).	Creation+2 years (provided report is on file with public works project record)	No	Waive

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Report of Special Assessment	Report of project that includes plans, specifications, cost estimates, and property affected. See Wis. Stat. § 66.0703(5) for more information. Authority provided by Wis. Stat. § 66.0703(5).	Creation+2 years (provided report is on file with public works project record)	No	Waive
Tax Calculation and Collection				
Escrow Account List	List of real estate taxes paid directly from an escrow account.	Event; Event=Superseded	No	Waive
Final Tax Roll	Real and personal property rolls. Calculated from assessment rolls to include total taxes and charges to be collected.	Creation+15 years	No	Notify
Statement of Taxes	Combined record of calculations used to set final taxes.	Permanent	No	N/A
Tax Calculation Support Records	Any record used to calculate municipal taxes. These include any certificates, evaluations, levies, estimates, payments, and credits used to determine real and personal property tax rolls.	Event+7 years; Event=Audit	No	Waive

Record Series Title	Series Description	Retention and Disposition	Confidential	WHS Notification
Tax Receipts	Receipts issued by treasurer upon payment of taxes. Includes any supporting documents associated with issuing and recording receipts of payments.	Event+7 years; Event=Audit of records by outside accounting firm	No	Waive
Tax Settlements	Used to verify tax collections compared to the taxes levied in the municipal records.	Event+7 years; Event=Audit	No	Waive
Unpaid Tax Statements	List of postponed real property, delinquent real property, and delinquent personal property taxes.	Creation+15 years (Retain with tax roll)	No	Waive

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RESOLUTION NO. 08-23-02

RESOLUTION AUTHORIZING THE ESTABLISHMENT OF FULL-TIME WOMEN AND INFANT CHILDREN (WIC) NUTRITIONIST BY REDUCTION OF THE PROGRAM ASSISTANT – WIC TO PART-TIME

1 **WHEREAS**, the Health & Human Services Committee and Administrative & Personnel Committee request the
2 establishment of a full-time WIC Nutritionist position within the Health Department by reducing the hours of the
3 current full-time Program Assistant – WIC position to part-time effective August 30, 2023; and
4

5 **WHEREAS**, the need for the WIC Nutritionist position has grown and the funding has limited the number of hours
6 that this position would be allowed to work due to budget restrictions; and
7

8 **WHEREAS**, using grant funding and the state allocated WIC dollars, the reduction of the hours to the full-time
9 Program Assistant – WIC, which provides clerical support to the WIC programs, would allow for sustained full-time
10 services of the WIC Nutritionist to members of the community at no additional cost to the Health Department
11 budget or county levy; and
12

13 **WHEREAS**, the funding fluctuates each year with the WIC department for all three positions that are currently
14 approved and hours are adjusted to stay off of the county levy on any given budget cycle; and
15

16 **WHEREAS**, should additional funds be available through grants, donations or other means, the Health Director
17 would be able to request an increase in the hours of the Program Assistant – WIC to the County Administrator for
18 approval and they would make the determination to allow grant funding to apply; and
19

20 **WHEREAS**, this would allow the Health Department to address the fluctuations of the grant and state funding
21 without disrupting the established budget each year.
22

23 **NOW, THEREFORE, BE IT RESOLVED** by the Monroe County Board of Supervisors that they do hereby
24 authorize the full-time Program Assistant – WIC position be reduced to a part-time position effective August 30,
25 2023.
26

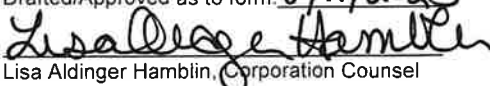
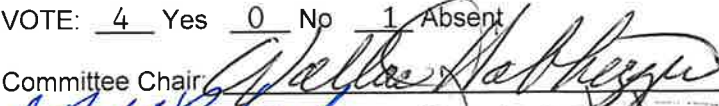

27 **FURTHER BE IT RESOLVED** by the Monroe County Board of Supervisors that they do hereby authorize to
28 increase the part-time WIC Nutritionist position within the Health Department to a full-time position effective
29 August 30, 2023.

Dated this 30th day of August 2023.

Offered By The Administration & Personnel Committee.

Fiscal note: The total cost of the increase in the hours of the WIC Nutritionist would be offset by the Program Assistant's – WIC's reduction in hours causing no additional costs annually and would remain off the county levy. Should the grants or state funding mechanisms cease at any point, the County Board would then evaluate the continuation of said positions.

Statement of purpose: Reallocate hours and funding from a full-time Program Assistant - WIC position inside the WIC unit of the Monroe County Health Department and increase the part-time WIC Nutritionist to full-time.

<p>Finance Vote (If required): <u>4</u> Yes <u>0</u> No <u>1</u> Absent</p> <p>----- Drafted/Approved as to form: <u>8/11/2023</u>  Lisa Aldinger Hamblin, Corporation Counsel</p>	<p>Committee of Jurisdiction Forwarded on: <u>August 8</u>, 20<u>23</u></p> <p>VOTE: <u>4</u> Yes <u>0</u> No <u>1</u> Absent</p> <p>Committee Chair:   </p>
---	--

ADOPTED FAILED AMENDED

OTHER _____

County Board Vote on: _____ 20__

_____ Yes _____ No _____ Absent

STATE OF WISCONSIN
COUNTY OF MONROE

I, SHELLEY R. BOHL, Monroe County Clerk, DO HEREBY CERTIFY that the foregoing is a true and correct copy of Resolution # _____ acted on by the Monroe County Board of Supervisors at the meeting held on _____.

SHELLEY R. BOHL, MONROE COUNTY CLERK
A raised seal certifies an official document.

New Position Analysis



- New position
- Increased hours to current position
- Additional existing position

Date: July 21, 2023	Department: Health
Department Head Name: Tiffany Giesler	

Explain the necessity of this position (be specific as to the reasons why this position is needed and explain reasons why present staff cannot accomplish tasks):

The Health Department is requesting an increase in the WIC Nutritionist position from 32 hours to 40 hours. The increase in hours is needed to assure department coverage and adequate delivery of client service as the result of the resignation of the WIC Program Assistant and an increasing client caseload. Previous staffing levels were for a full-time program assistant, full-time director and up to a .8 WIC Nutritionist. With an increase in salaries from the recent wage study and the growing caseload, the need is greater to have the WIC Nutritionist position be full-time. These positions and associated hours are based on State/Federal funds provided and hours are adjusted to keep staffing levels within the allocated funds. There are no dedicated county levy dollars that support these positions.

Suggested Title: WIC Nutritionist			
Personnel Director's Recommended Classification:		Grade: P	FLSA Class: exempt
Full-time:	<input checked="" type="checkbox"/>	Part-time: /hours	Projected Start Date:

Current or newly created Job Description in current County format must be attached.

A completed and approved Resolution must also accompany this Position Analysis.

Funding - Annual Costs to include family insurance coverage:

Hourly Rate	Annual Salary	Retirement	Social Security	Medicare	Work Comp	Health Ins.	Dental Ins.	Life Ins.
\$30	\$62,640	\$4,620	\$3,884	\$909	\$36	\$23,941	\$839	\$18

1. Where will the funds for this position come from?
 State and Federal funds/grants

2. What equipment will need to be purchased for this position (desk, etc.)?
 none
 a. Is office space presently available? Yes Where? Health Department-Community Services Building
 b. Estimated cost of needed equipment? 0
 c. Is the cost of needed equipment in the department budget? N/A
3. What is the grand total cost of all items this fiscal year? Increasing to full-time would be an additional \$6,394 for 2023
4. What is the annual cost of salary and fringes, thereafter? \$96,537 (based on 2023 rates)



JOB DESCRIPTION

Title:	WIC Nutritionist	Date:	
Department:	Health	Pay Grade:	P
Reports To:	WIC & Nutritionist Manager	FLSA Status:	Exempt

POSITION SUMMARY

This position provides nutrition assessment, education, and counseling for individuals and groups participating in the WIC program and other nutrition programs and services.

ESSENTIAL FUNCTIONS

The following duties are typical for this position. However, these are not to be construed as exclusive or all-inclusive. To perform this job successfully, an individual must be able to perform each duty satisfactorily. Other duties may be required and assigned.

1. Assesses clients for nutritional counseling needs and provides nutrition counseling. Determines and prescribes WIC food package and breast pumps based upon assessed needs. Documents assessment and services provided.
2. Completes nutrition assessments and provides nutrition counseling as needed for participants of departmental programs. Documents care provided. Communicates nutrition care provided to clients' care coordinators within confidentiality policies.
3. Refers clients according to assessment to other public health programs or community resources within confidentiality policies. Prepares related documents.
4. ~~Issues~~ May assist issuing WIC benefits, weighing and measuring infants/children, performing finger or heel stick blood draws, scheduling, determining client income, etc., as required.
5. Conducts nutrition high risk counseling.
6. Develops and implements tracking systems for high-risk participants.
- ~~7. Reviews computer generated reports, monitors results and information to do needs assessment for program planning.~~
- ~~8.~~7. Develops nutrition education materials needed for departmental programs and services.
- ~~9.~~8. May Serves as Breastfeeding Peer Counselor ~~Coordinator, WIC Vendor and /or Farmer contact and Fit Families Coordinator~~ and effectively implements ~~the Breastfeeding Peer Counseling corresponding program requirements program.~~
- ~~10.~~9. Assists in maintaining inventory of nutrition education and breastfeeding-related materials and supplies.
- ~~11.~~10. Develops, provides, and evaluates group nutrition presentations and/or nutrition education displays.
- ~~12.~~11. Develops, plans, conducts or delegates, and evaluates secondary education services.
- ~~13.~~12. Develops, implements, and evaluates annual objectives.
- ~~14.~~13. Advises WIC and Nutritionist Manager of budget needs, particularly during grant application/renewal time.
- ~~15. Reviews reports and progress on objectives quarterly.~~
- ~~16.~~14. Ensures that food packages are issued based on needs and preferences.
- ~~17.~~15. Provides in-services to agency staff.
- ~~18.~~16. Other duties as assigned.

MINIMUM REQUIRED QUALIFICATIONS

- Bachelor's Degree in Nutritional Sciences or Dietetics and one (1) year of professional work experience in public health, community nutrition/maternal-child health, lactation, or nutrition.
- Wisconsin Certified Dietitian, Registered Dietitian with the National Commission on Dietetic Registration (CDR).
- Must have or obtain Lactation Counselor, Lactation Specialist, or Lactation Educator certification at time of hire.
- Must successfully pass caregiver and criminal background check.

PREFERRED QUALIFICATIONS

Previous WIC program Experience

REQUIRED JOB COMPETENCIES

- Knowledge of the principles of normal and therapeutic nutrition.
- Knowledge of nutrition and dietary assessment techniques including anthropometric, biochemical, clinical, and dietary.
- Knowledge of the interrelationships between health and social service programs and appropriate community resources.
- Knowledge of human behavior and techniques for effecting change.
- Ability to interpret nutritional and dietary data.
- Skill in preparing reports, health, and medical histories.
- Knowledge of laws and regulations that affect the delivery of services provided by the Department.
- Knowledge of community resources, and alternative care resources.
- Knowledge of applicable State statutes.
- Knowledge of and sensitivity to cultural differences and special needs of various minority groups, and ability to consult with other staff regarding these.
- Ability and skill to relate to clients in stressful or crisis situations.
- General knowledge of interviewing and supportive counseling techniques.
- General knowledge of social casework techniques.
- Knowledge of social, economic, and health problems of basic human behavior and of available assistance and rehabilitative services and techniques.
- Knowledge of human service needs assessment methodologies.
- Knowledge of legal requirements including privacy, resident rights, confidentiality, and non-discrimination.
- Knowledge of goals, principles and practices of human service programs, program administration, and program goals and their intended impacts.
- Knowledge of the County and Department's operating requirements, policies, procedures, and practices; and local, State, and Federal regulations related to department programs and operations.
- Skill in analyzing complex administrative information and issues, defining problems and evaluating alternatives, and recommending methods, procedures, and techniques for resolution of issues.
- Ability to research and analyze detailed information and make appropriate recommendations.
- Ability to develop, interpret, and implement regulations, policies, procedures, written instructions, general correspondence, and other department-specific documents.
- Ability to adapt and take control of situations, dictating subordinate activities in a responsible manner.

- Ability to establish and maintain accurate records of assigned activities and operations.
- Ability to interpret and implement local policies and procedures; written instructions, general correspondence; Federal, State, and local regulations.
- Skill in organizational and time management to prioritize duties to accomplish a high volume of work product while adapting to constant changes in priority.
- Ability to perform detailed work accurately and independently in compliance with stringent time limits requiring minimal direction and supervision.
- Ability to think quickly, maintain self-control, and adapt to stressful situations.
- Knowledge of current office practices and procedures and knowledge of the operation of standard office equipment and software.
- Knowledge of computer software ~~including~~ consistent for this position.
- Ability to perform mathematical calculations required of this position.
- Ability to communicate clearly, concisely, and effectively in English in both written and verbal form.
- Skill in researching and understanding complex written materials.
- Ability to prepare and maintain accurate and concise records and reports.
- Ability to apply sound judgment and discretion in performing duties, resolving problems, and interpreting policies and regulations.
- Ability to communicate detailed and often sensitive information effectively and concisely, both orally and in writing.
- Ability to handle sensitive interpersonal situations calmly and tactfully.
- Ability to maintain professionalism at all times.
- Ability to maintain effective working relationships with individuals within and outside the organization.
- Ability to maintain confidentiality and discretion regarding business-related files, reports, and conversations, within the provisions of open records laws and other applicable State and Federal statutes and regulations.
- Ability to work the allocated hours of the position and respond after hours as needed.

PHYSICAL AND WORK ENVIRONMENT

The physical and work environment characteristics described in this description are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions as otherwise required by law. Employees needing reasonable accommodation should discuss the request with Human Resources.

- This work requires the occasional exertion of up to 25 pounds of force; work regularly requires sitting, frequently requires standing, speaking or hearing, using hands to finger, handle or feel and repetitive motions and occasionally requires walking, stooping, kneeling, crouching or crawling and reaching with hands and arms.
- Work has standard vision requirements.
- Vocal communication is required for expressing or exchanging ideas by means of the spoken word.
- Hearing is required to perceive information at normal spoken word levels.
- Work requires preparing and analyzing written or computer data and observing general

surroundings and activities.

- Work frequently requires exposure to blood borne pathogens and may be required to wear specialized personal protective equipment.
- Work is performed in an office setting as well as offsite clinic work sites.

Nothing in this job description limits management's right to assign or reassign duties and responsibilities to this job at any time. The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position. The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

EMPLOYEE ACKNOWLEDGEMENT

I have received, reviewed and fully understand this job description. I further understand that I am responsible for the satisfactory execution of the essential functions as well as skills and abilities described therein. Furthermore, I understand this document will change over time, as necessary, and this document supersedes all prior descriptions. I understand I may be asked to perform duties and handle responsibilities that are not specifically addressed in my job description, from time to time. I understand that this does not constitute an employment agreement.

Employee Signature

Date

Employee Printed Name

08-23-03
RESOLUTION NO. _____

RESOLUTION AUTHORIZING PART-TIME MUSEUM SERVICES ASSOCIATE POSITION IN THE LOCAL HISTORY ROOM

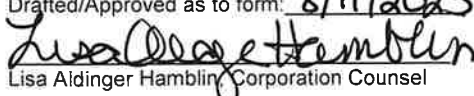
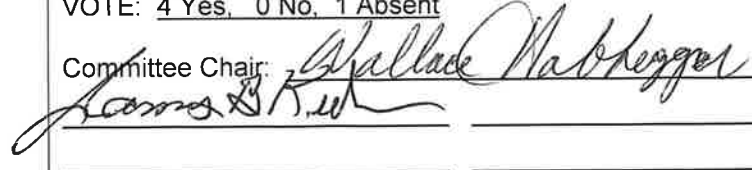
1 **WHEREAS**, in the 47 years the Monroe County Local History Room has been in operation, it has only had one
2 full time employee; and
3
4 **WHEREAS**, a 28-hour part time position was added in 1999, bringing total staff to 1.75 (although the part time
5 position was only staffed 16 hours per week until 2017); and
6
7 **WHEREAS**, the "audience served" number for 1999 was an audience of 2,303 people. That number in 2022 was
8 7,451 people, which is a 224% increase over 1999. The History Room saw an audience of 12,322 people in 2019
9 (pre-Covid), and each year they are building back to that number, yet staff levels do not increase; and
10
11 **WHEREAS**, the History Room as a department of Monroe County is actually three distinct sites with three
12 separate audiences, services, and demands: the History Museum, Research Library, and the Wegner Grotto
13 County Park.
14
15 **NOW, THEREFORE, BE IT RESOLVED** by the Monroe County Board of Supervisors that they do hereby
16 authorize the addition of a part-time Museum Services Associate, totaling 20 hours per week effective January 1,
17 2024.

Dated this 30th day of August, 2023.

Offered by the Administrative & Personnel Committee

Fiscal Note: No additional cost to Monroe County, the additional cost of \$26,335.00, will come from income generated by the Local History Room Endowment in 2024 and subsequent years. If the Local History Room Board of Trustees elects to discontinue the funding for the position, Monroe County would reevaluate the need for the position. This resolution will require a 2/3 vote of the entire membership of the Monroe County Board of Supervisors for approval.

Purpose: Approve an additional part-time Museum Services Associate position to a total of 20 hours per week, effective January 1, 2024.

<p>Finance Vote (If required): <u> 4 </u> Yes <u> 0 </u> No <u> 1 </u> Absent</p> <p>*****</p> <p>Drafted/Approved as to form: <u>8/11/2023</u>  Lisa Aldinger Hamblin, Corporation Counsel</p>	<p>Committee of Jurisdiction Forwarded on: <u>August 8, 2023</u></p> <p>VOTE: <u>4</u> Yes, <u>0</u> No, <u>1</u> Absent</p> <p>Committee Chair: </p> <hr/> <hr/>
<p><input type="checkbox"/> ADOPTED <input type="checkbox"/> FAILED <input type="checkbox"/> AMENDED</p> <p><input type="checkbox"/> OTHER _____</p> <p>County Board Vote on: _____ 20 _____</p> <p><u> </u> Yes <u> </u> No <u> </u> Absent</p>	<p>STATE OF WISCONSIN COUNTY OF MONROE</p> <p>I, SHELLEY R. BOHL, Monroe County Clerk, DO HEREBY CERTIFY that the foregoing is a true and correct copy of Resolution # _____ acted on by the Monroe County Board of Supervisors at the meeting held on _____.</p> <hr/> <p>SHELLEY R. BOHL, MONROE COUNTY CLERK <i>A raised seal certifies an official document.</i></p>

RESOLUTION NO. 08-23-04

RESOLUTION AUTHORIZING TEN ADDITIONAL HOURS PER WEEK FOR THE MUSEUM SERVICES ASSOCIATE POSITION IN THE LOCAL HISTORY ROOM

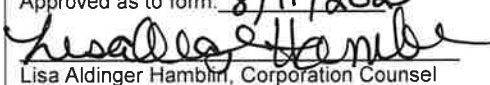
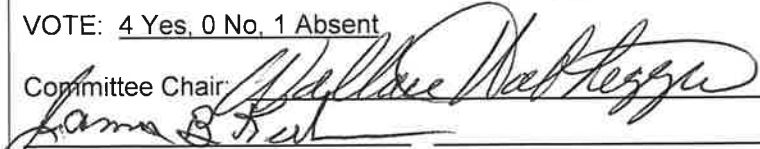

1 **WHEREAS**, Resolution 02-18-01 authorized two additional hours per week for the Museum Services Associate position in the
 2 Local History Room with the funds to cover the additional salary and benefit costs for those additional two hours coming from
 3 the Local History Room Trust; and
 4
 5 **WHEREAS**, the Financial Adviser of the Monroe County Local History Room & Museum (MCLHR) Endowment determined
 6 that spending up to 2.5% percent of annual income (dividends) generated through the Endowment would not cause a
 7 significant, negative effect to the long-term goals of the MCLHR, nor result in the need to sell the core stock positions; and
 8
 9 **WHEREAS**, the Monroe County Natural Resources & Extension Committee and Administrative & Personnel Committee
 10 request the addition of ten hours per week to the Museum Services Associate position which would increase the hours of the
 11 part-time position from 30 to 40 per week with funding provided by income generated by the Local History Room Endowment;
 12 and
 13
 14 **WHEREAS**, due to the increasing demands for services provided to the public by the Local History Room and the need for
 15 fulfilling mission-related activities, the Local History Room Board of Trustees voted to increase the hours of the Museum
 16 Services Associate from 30 to 40 per week with the understanding that the Local History Room Trust would provide the funds
 17 to cover the additional salary and benefit costs for those additional ten hours in 2024 and subsequent years. If the Local
 18 History Room Board of Trustees elects to discontinue the additional funding of the position, Monroe County would not fund the
 19 position beyond the 28 hours per week established by Resolution 9-99-7.
 20
 21 **NOW, THEREFORE, BE IT RESOLVED** by the Monroe County Board of Supervisors that they do hereby authorize the
 22 addition of ten hours per week for the Museum Services Associate to a total of 40 hours per week effective January 1, 2024.

Dated this 30th day of August, 2023.

Offered by the Administrative & Personnel Committee.

Fiscal Note: No additional costs to Monroe County, the additional cost of \$21,863.00 (the total of 12 additional hours) will come from income generated by the Local History Room Endowment in 2024 and subsequent years. If the Local History Room Board of Trustees elects to discontinue the additional funding of the position, Monroe County would not fund the position beyond the 28 hours per week established by Resolution 9-99-7. This resolution will require a 2/3 vote of the entire membership of the Monroe County Board of Supervisors for approval.

Purpose: Approve an additional ten hours per week for the part-time Museum Services Associate position to a total of 40 hours per week, thus making the position full-time, effective January 1, 2024.

Finance Vote (If required): <u>4</u> Yes <u>0</u> No <u>1</u> Absent ----- Approved as to form: <u>8/11/2023</u>  Lisa Aldinger Hamblin, Corporation Counsel	Committee of Jurisdiction Forwarded on: <u>August 8, 2023</u> VOTE: <u>4</u> Yes, <u>0</u> No, <u>1</u> Absent Committee Chair:  
<input type="checkbox"/> ADOPTED <input type="checkbox"/> FAILED <input type="checkbox"/> AMENDED <input type="checkbox"/> OTHER _____ County Board Vote on: _____ <u>20</u> _____ Yes _____ No _____ Absent	STATE OF WISCONSIN COUNTY OF MONROE I, SHELLEY R. BOHL, Monroe County Clerk, DO HEREBY CERTIFY that the foregoing is a true and correct copy of Resolution # _____ acted on by the Monroe County Board of Supervisors at the meeting held on _____ _____ SHELLEY R. BOHL, MONROE COUNTY CLERK <i>A raised seal certifies an official document.</i>

**MONROE COUNTY
PERSONNEL COSTS
2023 BUDGET**

DEPARTMENT: History Room

*round off all totals to the nearest dollar

JOB TITLE	EMPLOYEE NAME	ANNUAL SALARY	OVERTIME	RETIREMENT	SOCIAL SECURITY	MEDICARE	HEALTH	DENTAL	LIFE	TOTAL FRINGE	WORKERS COMP.	TOTAL
New 1/2 Time Position	18.68	\$ 19,427		\$ -	\$ 1,205	\$ 282	\$ 5,265	\$ 135	\$ 9	\$ 6,896	\$ 12	\$ 26,335
		\$ -										
Hannah Scholze -Currently paid 2 hrs/wk by History	\$19.67& 4% raise to \$20.45	\$ 2,412		\$ 165	\$ 150	\$ 35	\$ 2,633	\$ 67	\$ -	\$ 3,050	\$ 2	\$ 5,464
		\$ -										
Hannah if at 40 hrs/week - 12 hrs/wk paid by history room	\$19.67& 4% raise to \$20.45	\$ 14,473		\$ 985	\$ 898	\$ 210	\$ 5,144	\$ 135	\$ 9	\$ 7,381	\$ 9	\$ 21,863
		\$ -		\$ -	\$ -	\$ -				\$ -	\$ -	\$ -
****Both Positions calculated using SINGLE Health & Dental												
Grand Total												

Wisconsin Retirement

General Employee - 0.0680
Protective Employee - 0.1322

2023 Workers Compensation Rate

Street Const. 0.0166
Protective 0.0087
Municipal Oper. 0.0115
Office/Clerical 0.0006

2023 Health Insurance

86% CoShare
Single \$867.44
Family \$1,995.10

Social Security 0.062
Medicare 0.0145

2023 Dental Insurance

87% CoShare
Single \$22.48
Family \$69.90

Life Insurance \$1.50

***Insurance Rates for part-time employees are different - please call Personnel or Finance for rates**

County Portion		1/2 time	3/4 time
Health	Single	438.76	658.14
Dental	Single	11.24	16.86

RESOLUTION NO. 08-23-05

RESOLUTION AUTHORIZING CONTRACT SETTLEMENT FOR 2024-2025 COLLECTIVE BARGAINING AGREEMENT BETWEEN MONROE COUNTY AND THE MONROE COUNTY PROFESSIONAL POLICE ASSOCIATION

1 **WHEREAS**, the Bargaining Committee of the Monroe County Board of Supervisors met with representatives of
2 the Monroe County Professional Police Association during the past few months to negotiate a 2024-2025
3 collective bargaining agreement; and
4

5 **WHEREAS**, the parties were able to resolve their differences and reached a voluntary settlement for 2024-2025
6 on July 17, 2023; and
7

8 **WHEREAS**, the parties agreed to a change in the pay structure from two steps to four with one and one-half
9 percent increase from the 2023 rates for first year Patrol and Bailiff's step one, the following three steps were
10 calculated off of the second step in 2023 at four percent increase for step two, six and one-half percent for step
11 three, and nine percent for step four, based on years of service for 2024, and a four percent increase across all
12 steps created for 2025. The parties also agreed to incorporation of hiring exception language, updating the title of
13 Patrol Officer to Patrol Deputy, language regarding seniority, holidays, uniform allowance, and sick leave to
14 remain more consistent with the full personnel policy manual.
15

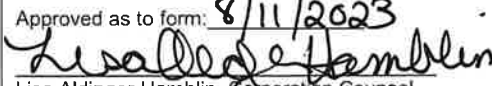
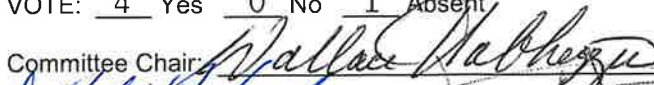

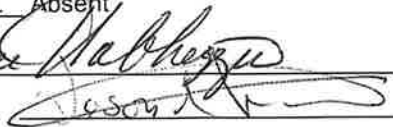
16 **NOW, THEREFORE, BE IT RESOLVED** by the Monroe County Board of Supervisors that the Bargaining
17 Committee is authorized and empowered to enter into the attached two-year agreement with the Monroe County
18 Professional Police Association for 2024-2025 on behalf of the County of Monroe, state of Wisconsin.

Dated this 30th day of August 2023.

Offered By: The Administration & Personnel Committee:

Fiscal note: \$129,645 in additional wages and wage-related benefits will be included in the 2024 budget, and similar 2025 costs will be included in the 2024 and 2025 budgets.

Statement of purpose: Ratify a successor two-year agreement with the Monroe County Professional Police Association.

Finance Vote (If required): <u>4</u> Yes <u>0</u> No <u>1</u> Absent Approved as to form: <u>8/11/2023</u>  Lisa Aldinger Hamblin, Corporation Counsel	Committee of Jurisdiction Forwarded on: <u>August 8</u> , 2023 VOTE: <u>4</u> Yes <u>0</u> No <u>1</u> Absent Committee Chair:   
<input type="checkbox"/> ADOPTED <input type="checkbox"/> FAILED <input type="checkbox"/> AMENDED <input type="checkbox"/> OTHER _____ County Board Vote on: _____ 20____ ____ Yes _____ No _____ Absent	STATE OF WISCONSIN COUNTY OF MONROE I, SHELLEY R. BOHL, Monroe County Clerk, DO HEREBY CERTIFY that the foregoing is a true and correct copy of Resolution # _____ acted on by the Monroe County Board of Supervisors at the meeting held on _____ SHELLEY R. BOHL, MONROE COUNTY CLERK A raised seal certifies an official document.

**AGREEMENT BETWEEN
THE COUNTY OF MONROE
and
WISCONSIN PROFESSIONAL POLICE ASSOCIATION/
LAW ENFORCEMENT EMPLOYEE RELATIONS
DIVISION**

**For and Behalf of
MONROE COUNTY PROFESSIONAL POLICE
ASSOCIATION**

1/1/2024 – 12/31/2025

AGREEMENT

This Agreement, made and entered into by and between the County of Monroe, as a municipal employer, hereinafter called the County, and the Wisconsin Professional Police Association/Law Enforcement Employee Relations Division, for and on behalf of Monroe County Professional Police Association, hereinafter called the Association, is set forth as follows:

PREAMBLE

Both parties to this Agreement are desirous of reaching an amicable understanding with respect to the employee-employer relationship that is to exist between them, and enter into an Agreement covering rates of pay, hours of work and conditions of employment, as well as procedures for reducing potential conflict.

ARTICLE 1. RECOGNITION AND DUES AGREEMENT

Section 1. The County recognizes the Association as the sole and exclusive bargaining agent for all regular full-time law enforcement personnel having the powers of arrest in the employ of the Sheriff's Department of Monroe County, including employees classified as Patrol Deputy, Bailiff, Sergeants, and Investigators, but expressly excluding the Sheriff, Chief Deputy, Captains, Lieutenants, clerical personnel, and other managerial, supervisory, confidential, and executive employees for the purpose of collective bargaining on matters of wages, hours, and conditions of employment.

Section 2. Membership Not Required: Membership in any employee organization is not compulsory. Employees have the right to join, not join, maintain, or drop their membership in an employee organization as they see fit. No employee will be denied membership because of age, race, sex, creed, ancestry, disability, arrest and conviction records, marital status, sexual preference or national origin. This Article is subject to the duty of the Wisconsin Employment Relations Commission to suspend the application of this Article wherever the Commission finds that the Association has denied an employee membership because of age, race, sex, creed, ancestry, handicap, arrest and conviction records, marital status, sexual preference or national origin.

Section 3. Dues Deduction: The Employer agrees to deduct monthly dues in the amount certified by the WPPA/LEER from the pay of employees who individually sign a dues deduction authorization form supplied by the WPPA/LEER. In addition, the Local Association may authorize local dues which shall be deducted in conjunction with the WPPA/LEER dues. The Employer shall deduct the combined dues amount each month for each employee requesting such deduction, upon receipt of such form and shall remit the total of such deductions, with a list of employees from whom such sums have been deducted, to the WPPA/LEER or Local Association if applicable, in one lump sum not later than the 15th of each month. Authorization of dues deduction by a voluntary member may be revoked upon notice in writing to the Employer, WPPA or to the Local Association. No employee shall be required to join the Association, but membership in the Association shall be made available to all employees in the bargaining unit who apply consistently with the either the WPPA or local Association Constitution and By-Laws. No employee shall be denied membership because of race, creed color or sex.

Section 4. Hold Harmless Clause: It is expressly understood and agreed that the Association will refund to the County or to the employee involved any dues erroneously collected by the County and paid to the Association. The Association agrees to save and hold the County harmless from any claims or demands arising out of the County's compliance with the provisions of this Article.

ARTICLE 2. MANAGEMENT RIGHTS

Section 1. The County possesses the sole right to operate County government and all management rights repose in it, subject only to the provisions of this Agreement and applicable law.

These rights include, but are not limited to the following:

- A.** To direct all operations of the County;
- B.** To establish reasonable work rules and schedules of work;
- C.** To hire, train, promote, transfer, schedule, and assign employees to positions within the County;
- D.** To suspend, demote, discharge, and take other disciplinary action against employees for just cause;
- E.** To relieve employees from their duties because of lack of work or any other legitimate reason;
- F.** To maintain efficiency of County government operations;
- G.** To take whatever action is necessary to comply with state or federal law;
- H.** To introduce new or improved methods or facilities;
- I.** To change existing methods or facilities;
- J.** To determine the kind and amount of services to be performed as pertains to County government operation; and the number and kinds of classifications to perform each service;
- K.** To contract out for goods and services;
- L.** To determine the methods, means, and personnel by which County operations are to be conducted;
- M.** To take whatever action is necessary to carry out the functions of the County in situations of emergency;
- N.** No Article or Section of this Agreement shall be interpreted to abridge the duties or powers of the Sheriff as outlined in appropriate State Statutes relative to the operation of the jail, the service of papers, or any other statutory duties or powers of the Sheriff's Office.

Section 2. The County has the right to hire an external candidate to a full-time position as defined in ARTICLE 4. WAGES (Patrol Sergeant, Investigator, Patrol Deputy, or Bailiff) at a rate of pay for those who have completed more than one year of employment with Monroe County if they have the following qualifications:

- a. Currently employed as a full-time law enforcement officer and have a minimum of three (3) years of continuous service as a full-time law enforcement officer excluding academy time.
- b. Employment must be with an agency of similar or greater jurisdictional responsibility or agency size, unless an exception is made at the discretion of the Sheriff.
- c. Currently certified as a Wisconsin Police Officer.
- d. Seniority will be based off of date of hire with Monroe County consistent with Article 14.

In addition to the conditions mentioned above for hiring a candidate at the higher rate of pay per union contract Monroe County would reserve the right to hire a staff member at a higher rate of vacation accrual based on the policy as outlined in ARTICLE 13. VACATIONS if the candidate would have the following qualifications:

- a. Currently employed as a full-time law enforcement officer and have a minimum of three (3) years of continuous service as a full-time law enforcement officer excluding academy time to mirror the requirements of Monroe County's staff as outlined in Article 13.
- b. Employment must be with an agency of similar or greater jurisdictional responsibility or agency size, unless an exception is made at the discretion of the Sheriff.

- c. Currently certified as a Wisconsin Police Officer.

All qualifications would have to be approved by the Monroe County Sheriff.

The County's exercise of the foregoing functions shall be limited only by the express provisions of this Agreement. If the County exceeds this limitation, the matter shall be processed under the grievance procedure. The Association in recognizing the above listed Management Rights does not waive any of its rights to negotiate on subjects which are held out to be mandatory subjects of bargaining.

ARTICLE 3. GRIEVANCE AND ARBITRATION PROCEDURE

A. Definition of Grievance: A grievance shall mean a dispute concerning the interpretation or application of this Agreement.

B. Subject Matter: Only one (1) subject matter shall be covered in any one (1) grievance. A written grievance shall contain the name and position of the grievant, a clear and concise statement of the grievance, the issue involved, the relief sought, the date the incident or violation took place, the specific Section of the Agreement alleged to have been violated and the signature of the grievant and the date.

C. Time Limitations: If it is impossible to comply with the time limitations specified in the procedure because of work schedules, illness, vacations, etc., these limits may be extended by mutual consent in writing.

D. Settlement of Grievance: Any grievance shall be considered settled at the completion of any step in the procedure, if all parties concerned are mutually satisfied. Dissatisfaction is implied in recourse from one step to the next.

E. Steps in the procedure:

Step 1: The employee, alone or with the Association representative, shall orally explain the grievance to the Department Head no later than ten (10) calendar days after they knew or should have known of the cause of such grievance. In the event of a grievance, the employee shall perform the assigned work task and grieve the complaint later. The Department Head shall, within ten (10) calendar days, orally inform the employee and the representative, where applicable, of the decision.

Step 2: If the grievance is not settled at the first step, the employee and/or the Association representative shall reduce the grievance to writing on a County grievance form and shall submit the written grievance, within ten (10) calendar days of the oral decision, to the Department Head. The employee shall continue to perform assigned tasks as in step one (1) and as in future steps. The Department Head shall consider the written grievance and shall respond in writing within ten (10) calendar days.

Step 3: If the grievance is not settled at the second step, the employee and/or the Association representative may appeal the grievance in writing to the Monroe County Administrator within ten (10) calendar days after receipt of the written decision of the Department Head. The Monroe County Administrator shall respond within ten (10) calendar days in writing.

F. Arbitration:

1) Time Limit: If a satisfactory settlement is not reached in Step 3, the Association must notify the Monroe County Administrator in writing within ten (10) calendar days that they intend to process the grievance to arbitration.

2) Arbitrator: Any grievance which cannot be settled through the above procedure may be processed through arbitration. The Association and the County shall have the option to agree on an impartial private arbitrator to hear the grievance. If, after a good faith effort to agree on a private arbitrator within a period of ten (10) calendar days unless mutually agreed to extend the time, the parties fail to agree, the parties jointly or separately may petition the Wisconsin Employment Relations Commission for a staff arbitrator.

3) Arbitration Hearing: The arbitrator shall meet with the parties at a mutually agreeable date to review the evidence and hear testimony relating to the grievance. Upon the completion of this review and hearing, the arbitrator shall render a written decision to both the County and the Association which shall be binding upon both parties.

4) Costs: Both parties shall share equally the costs and expenses of the arbitration proceedings, including transcript fees and fees of the arbitrator, if any. Each party, however, shall bear its own costs for their witnesses and all other out-of-pocket expenses including possible attorney fees. Testimony or participation of employees shall not be paid by the County, except, an employee shall be paid their regular salary if ordered by the County to spend time in the preparation or attendance at such hearing during the regularly scheduled work shift. The arbitration hearing shall be conducted in the Monroe County Justice Center in Sparta, Wisconsin.

5) Transcript: No transcript shall be prepared for an arbitration hearing unless mutually agreed to do so. This shall not preclude either side from paying for their own transcript if they so choose. Should one side choose to pay for a transcript, said transcript shall not be available to the other side unless a payment is agreed upon.

6) Decision of the Arbitrator: The decision of the arbitrator shall be limited to the subject matter of the grievance and shall be restrained solely to interpretation of the Agreement in the area where the alleged breach occurred. The arbitrator shall not modify, add to, or delete from the express terms of this Agreement.

7) Notice: The Association shall provide a ten (10) calendar day notice of the names of bargaining unit witnesses needed for arbitration hearings directly to the Sheriff or their designee, provided sufficient time is allowed by the Arbitrator. However, a technical non-compliance with this provision shall not prevent the Association from calling any witness it deems appropriate.

G. Past Grievances: Past grievances may not be filed under the provisions of the procedure and all grievances filed which bear a filing date which precedes or is the same as the expiration date of this Agreement must be processed to conclusion under the terms of this procedure.

ARTICLE 4. WAGES

Section 1. The annual wages, based upon actual hours worked, a pay period being two (2) calendar weeks, shall be as follows:

1/1/2024 – 12/31/2024 Rates:

Position	Step 1 (0-1 yrs.)	Step 2 (1-3 yrs.)	Step 3 (4-7 yrs.)	Step 4 (8+ yrs.)
Patrol Sergeant		\$32.96	\$33.75	\$34.54
Investigators		32.03	32.80	33.57
Patrol Deputy		30.86	31.60	32.34
Bailiff		29.93	30.65	31.37
First Year Patrol Deputy & Bailiff	\$27.29			

1/1/2025 – 12/31/2025 Rates:

Position	Step 1 (0-1 yrs.)	Step 2 (1-3 yrs.)	Step 3 (4-7 yrs.)	Step 4 (8+ yrs.)
Patrol Sergeant		\$34.28	35.10	35.92
Investigators		33.31	34.11	34.91
Patrol Deputy		32.09	32.86	33.63
Bailiff		31.13	31.88	32.63
First Year Patrol Deputy & Bailiff	\$28.39			

- A. The above hourly wages would calculate to an annual wage based upon 2080 and 2184 hours per year, depending upon the work cycle being worked.
- B. All employees who have been employed for more than one year shall be paid at the “Step” that reflects with their seniority as the first day of January each year. Progression through the steps will be based on years of service within the positions outlined above within this contract, unless hired at a higher rate of pay based on criteria outlined in Article 2. Section 2 of this agreement.
- C. Any employee who is hired as a Patrol Deputy or Bailiff will receive the first year rate of pay until completing one full year in that position. After completing one full year of employment, the employee will be paid the Patrol Deputy or Bailiff wages respectfully.
- D. Part-time employees covered by this Agreement shall work 2080 hours prior to qualifying for the rate paid to full-time employees who complete one (1) full year of employment.

The county has the right to place new hires within the pay step system listed above, based on criteria outlined in Article 2. Section 2 of this agreement. Any placement at a higher step would not affect any other seniority based benefit.

Section 2. A fifty cent (\$.50) per hour shift differential shall be paid to each employee for all hours worked between 6:00 P.M. and 6:00 A.M., both times inclusive.

Section 3. When members of this Association are assigned by the Department Head to fill a position in a higher rank classification, in an acting capacity or temporary assignment, they shall be entitled to the salary pertaining thereto provided the following conditions are met:

- A. The employee shall perform a minimum of two (2) hours in the higher graded position.
- B. A Patrol Deputy acting as a Sergeant OIC shall be paid at the Sergeant rate.
- C. OIC pay is authorized for the senior deputy working the patrol shift. OIC pay is not authorized for special assignments, training sessions, targeted patrol activities or other work assignments.

Section 4. Additional compensation for assignment to Field Training Officer (FTO) duties:

- A. Bargaining unit employees who are assigned by management to function as Field Training Officers (FTO) shall be compensated an additional fifty cents (\$.50) per hour for those hours assigned to FTO duties.
- B. This provision is specific to the initial FTO training plan and any extension approved by management, and does not extend to other training programs.
- C. The additional compensation becomes effective when the signed agreement is effective (1/1/24).
- D. The parties agree that this action is non-precedential and may not be used as a status quo condition in any arbitration proceeding.

Section 5. Employees working as instructors (examples not limited to: Firearms, Daat, EVOC, etc...) shall be paid an additional fifty (\$.50) cents per hour while actively instructing, as designated by department head.

Section 6. K-9 Handler Patrol Deputy

Compensation for Days Worked: The regular scheduled work day of the K-9 Handler shall be a 12 hour shift, with 30 minutes per day off being dedicated to the K-9 care (either beginning or ending of shift) as staffing allows. If a handler must work an entire shift they would be paid 30 minutes of overtime.

Compensation for Days Off: K-9 Handler shall receive 30 minutes of either overtime pay or compensatory time for each day not on-duty as the Deputy chooses.

Equipment/Supplies: The County shall provide the following:

- A. Complete veterinary care for the dog assigned to the Deputy.
- B. Necessary grooming supplies.
- C. Appropriate food supplies.
- D. Kenneling of dog while handler is out of town on vacation or other time off, not to exceed twenty-five (25) days per year. The Sheriff or designee may authorize additional days.
- E. Necessary training equipment.
- F. A kennel at the handler's residence.

Home Damage: Home damage situations and liability for same will be handled on a case by case basis. Proper handling, training and care of the animal which are the responsibility of the handler may be factors in some situations where some damage may occur for reasons beyond the control of the handler.

Training: K-9 Handler receive 16 hours per month for K-9 specific training. This is not to be included as part of the Deputies 24 hours of required annual training.

Monroe County is responsible for all costs of the canine for departmental purposes as long as the K-9 program exists. It is also understood by both parties, that Monroe County retains the right to discontinue the K-9 operations at any time for any reason. All other provisions of the collective bargaining agreement apply to the K-9 position.

ARTICLE 5. HOURS

Section 1. The normal working hours for full-time employees shall be between eight (8) and twelve (12) hours per day, and between eighty (80) and eighty-four (84) hours per pay period, depending upon the work cycle being worked. Work schedules are drawn by the Department Head. The normal work day for regular part-time employees shall be the same as that worked by full-time employee in the same work classification. Efforts will be made to find shift coverage to reduce extended shifts beyond 12 hrs. Assignments may be outside of regular hours in periods of emergency, to protect County property for health or safety reasons or other unusual circumstances.

A. Patrol Deputies covered by the collective bargaining agreement shall work a twelve (12) hour shift schedule. Sheriff would reserve the authority to schedule special assignments outside the established 12 hr. shift rotation. These special assignments could still be ordered to cover other shifts.

B. For the term of this agreement the work schedule for Patrol Deputy shall be as follows, (2 days on/2 days off/ 3 days on/ 2 days off/ 2 days on/ 3 days off) with the rotation as follows: Monday, Tuesday work/ Wednesday, Thursday off/ Friday, Saturday, Sunday work/ Monday, Tuesday off/ Wednesday, Thursday work/ Friday, Saturday, Sunday off.

C. The normal pay period for detectives shall consist of eight 9-hour days and one 8 hour day. This will allow for a day off during the week for every two week pay period. Friday's will be the agreed upon day off, alternated every other week, unless a different day is submitted and approved or assigned by the Sheriff, Chief Deputy, or Administrative Captain for that pay period. Any hours worked outside the normal shift hours or weekends will still be considered overtime. If holiday falls on a scheduled day off, staff will receive 8 hrs. of holiday pay per Article 7. HOLIDAYS, Section 2.

D. The normal pay period for a bailiff shall consist of ten 8-hour days. The scheduled work days shall be Monday through Friday. Any hours worked outside the normal shift hours or weekends will be considered overtime.

Section 2. Shift Selection: The employees shall have the opportunity to select shifts within their classification by seniority within the WPPA contract with Monroe County on an annual basis, on or before December 1st of each year. Seniority for a staff that is promoted to Patrol Sergeant will be contingent upon the date of promotion, and not prior years of service within the WPPA with Monroe County. For example, a 20 year Patrol Deputy, who is promoted to Patrol Sergeant, would not be able to use seniority over another Patrol Sergeant, who has been in the Sergeant role for 5 years, and only in the WPPA with Monroe County for 10 years. The selection shall become effective in the first pay period in January of the following year.

ARTICLE 6. OVERTIME AND COMPENSATORY TIME

Section 1. Overtime will not be expected except in emergencies, and other overtime will not be approved for pay except when approved by the Department Head or designee. The Department Head has the right to set overtime schedules in the manner most advantageous to the County and consistent with the requirements of municipal employment and the public interest.

Section 2. All hours worked outside the standard work day and/or the regularly scheduled work periods shall be paid at one and one-half (1½) times the employee's regular hourly rate of pay.

Section 3. A minimum of two (2) hours payable at one and one-half (1½) times shall be granted to any employee who is requested to report outside the regular schedule of hours. The two (2) hour minimum shall apply when scheduled court appearances are cancelled with less than forty-eight (48) hours' notice.

Section 4. Compensatory time may be accrued at the employee's option provided certain conditions are met. Employees shall be permitted to accumulate compensatory time in the same manner as overtime, at the rate of time and one-half (1½) times the employee's regular hours, provided that the employee's compensatory time accumulation shall not exceed forty-eight (48) hours at any one time. If an employee uses a portion of their accumulation, they may regenerate the same. Once compensatory time is accumulated, the employee may request as to when they will use the same, subject to the approval of the Department Head or their designee. The use of compensatory time shall not conflict with the needs of the department.

A. The limit for compensatory time used per calendar year to be no more than ninety-six (96) hours of compensatory time per calendar year provided that there is a volunteer to fill the shift, no officer has to be ordered to fill the compensatory time shift, and compensatory time does not prevent an officer from going to training events. Compensatory time off will not be approved on training days.

B. Bailiffs may take unlimited comp time off provided there is no backfill required.

Section 5. Any employee who is entitled to compensatory time at the time of terminating services with the County shall be paid for compensatory time with the employee's final paycheck.

Section 6. Overtime time shall not be payable in increments less than fifteen (15) minutes.

Section 7. Compensatory time must be used in increments of thirty (30) minutes or more.

ARTICLE 7. HOLIDAYS

Section 1. The holidays will be: New Year's Day, Friday before Easter, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Day after Thanksgiving, and Christmas Day. There shall be, in addition to the eight (8) holidays above, twenty (20) hours of floating holidays to be taken at the employee's discretion with prior supervisory approval. The use of floating holiday must not conflict with the needs of the department.

Section 2. All employees shall receive one and one-half (1½) times their regular hourly rate of pay for all work performed on holidays in addition to the regular eight (8) hour holiday which each employee shall receive for holiday whether worked or not. Holiday overtime shall continue beyond the eight hour holiday period as long as the employee remains on duty. Any employee whose regular day off shall fall on a holiday shall be entitled to one eight (8) hour holiday pay at straight time. An employee shall be deemed to have worked on a holiday only if their shift of duty commences during that holiday.

Section 3. Those employees classified as Investigators or Bailiffs with a Monday-Friday schedule will be scheduled off on any holidays declared in Section 1. Prior supervisor approval will be required for any work scheduled to be performed on holidays. Upon supervisor approval, compensation shall be paid as indicated in Article 7, Section 2.

ARTICLE 8. SICK LEAVE

Section 1. All full-time employees are entitled to eight (8) hours of sick leave per month, accumulative to one thousand forty (1040) hours. Accumulative sick leave is not payable or granted upon termination of employment. Employees shall be paid while on such sick leave at the regular rate of pay for the same number of hours they would normally have worked. To qualify for such sick leave, an employee must report that they are sick at least one (1) hour prior to the scheduled starting time whenever possible. Each sick employee shall be subject to check to verify the alleged sickness by a County representative. Sick leave shall be used in one-half (1/2) hour increments. A doctor's certificate may be required when a sick leave absence exceeds (25) consecutive work hours. Any employee who is found to have violated any sick leave regulation shall be subject to discipline or discharge.

Effective January 1, 2019 and payable after, there shall be a 50% payout of up to forty (40) hours of sick leave not utilized annually. Staff that use more than 40 hrs. of sick leave within a calendar year will not be eligible for this sick leave payout. Also, employees who use no sick leave for an entire calendar year and also comply with any other approved time off policies, shall have one additional floating holiday provided for use in the succeeding calendar year.

Section 2. Upon the retirement, total disability or death of an employee off duty, the employee or their beneficiary (in case of death) shall be paid twenty-five percent (25%) of accumulated sick leave credits up to one hundred and thirty (130) days as severance pay. Accumulated sick shall be paid out at one-hundred percent (100%) for any death of an employee that occurs within the line of duty.

Section 3. Sick leave will be granted when an employee is required to give care and attendance to a member of their immediate family (spouse, child, or other relative who is a member of the employee's immediate household) up to a maximum of forty (40) hours per year. The hours, if needed, shall be taken from the annual accrual of sick leave of the employee. These hours can't be used in place of childcare, due to school, daycare, or other childcare provider closure.

ARTICLE 9. REQUIRED TRAINING SESSIONS

Section 1. Whenever any employee is required or scheduled to attend law enforcement training sessions, workshops, or law enforcement conference, time so spent by the employee shall be considered part of the normal work schedule, except that a maximum of twelve (12) hours straight time may be paid for any twenty-four (24) hour period. The employee shall be compensated for the actual hours worked. Hours will be predetermined by the direct supervisor's approval for any training sessions attended.

Section 2. Any employee directed and required by the employer to use a personal vehicle for such employment or in the line of duty, shall be paid at the current authorized mileage rate for Monroe County.

Section 3. If required attendance at sessions requires an employee to be away from Monroe County between the hours of 12:00 o'clock noon and 1:00 o'clock P.M. or between 6:00 o'clock and 7:00 o'clock P.M., employee shall be reimbursed for the cost of the meal pursuant to County policy, but not less than \$8, \$10 and \$15 for breakfast, lunch and dinner respectively. If meal is provided as part of the training that portion of the per diem would not be included in the reimbursement.

Section 4. All travel or overnight stay shall adhere to the same guidelines as the Financial Policy and Procedure Manual.

ARTICLE 10. LEAVE OF ABSENCE

Section 1. Application for leave of absence shall be made to the County, with a copy of the same transmitted to the Association for informational purposes only, in writing, and shall be presented to the Department Head by the employee; the granting of such leaves and the length of time for such leaves shall be contingent upon the reasons for the requests. The Department Head may grant leaves of absence of fourteen (14) calendar days or less without further authorization of the County Administrator.

Leaves of absence for more than fourteen (14) calendar days shall be discussed with the Department Head by the employee. The Department Head shall present such requests to the County Administrator with a recommendation. The employee shall be notified by the Department Head of the date of the presentation of the recommendation to the County Administrator. All leaves of absence under this Agreement shall be without pay. A leave of absence may not be granted for taking of other employment. However, the term "other employment" shall not include selection to federal, state, county or municipal offices or Association duties.

Section 2. A period of up to but not more than one (1) year shall be granted as leave of absence due to personal illness, or for disability due to accident, whether work related or non-work related, provided a physician's certificate is furnished from time to time to substantiate the need for continuing the leave. Additional time may be extended in such cases by mutual consent of the employee and the County Administrator.

Section 3. Seniority shall continue to accrue during leaves of absence for personal illness and/or disability due to accident, whether work related or non-work related, for a period of up to one (1) year.

Section 4. Any employee elected to public office may be granted a leave of absence as necessary to fulfill the duties of such office. The period of time for such leave shall be subject to negotiations between the employee and the Department Head and the County Administrator.

Section 5. Seniority shall not accrue during leaves of absence for personal reasons; except that seniority shall accrue for leaves of fourteen (14) calendar days or less.

Section 6. Personal leaves of absence for pregnancy may be applied for as set forth in Section 2 above. Whenever an employee becomes pregnant, they shall furnish the employer with a certificate from their physician, stating the approximate date of delivery, the nature of work they may do, and the length of time they may continue to work during such pregnancy. Thereafter, upon request of the employer, she will furnish an additional certificate containing like information every thirty (30) days to forty-five (45) days.

The period of maternity leave will be up to twelve (12) weeks. The period extending beyond twelve (12) weeks will be resolved on an individual basis and accompanied by appropriate medical certification and submitted to the County Administrator. The employee may return to work sooner.

Should the employee desire to return to work sooner than six (6) weeks following delivery, the employee must have permission of their doctor. Disability due to pregnancy or childbirth shall be paid under the sick leave policy the same as any other temporary disability, consistent with Federal and State Statutes, provided a physician's statement is provided certifying that the employee is physically unable to work. In the absence of certification of physical incapacity, the employee may not use accumulated sick leave.

ARTICLE 11. LUNCH PERIODS

Each employee shall be entitled to one-half (½) hour lunch period during the shifts that cross the normal eating time for the noon and evening meals. The lunch period shall be scheduled at the discretion of the employer, and during such lunch period, employees shall be subject to call, if in the judgment of the employer, conditions make it necessary or desirable.

ARTICLE 12. BREAKS

Two (2) 15-minute or one (1) 30-minute break shall be allowed to each employee during each shift. The breaks shall be scheduled at the discretion of the Department Head or designee, and during such breaks, employees shall be subject to call, if in the judgment of the employer, conditions make it necessary or desirable. Breaks not taken for whatever reason do not accumulate for use at other times.

ARTICLE 13. VACATIONS

Section 1. After one year of continuous employment, a regular full-time employee shall have eighty (80) hours of paid vacation accrued. Employees will have access to use vacation accruals as accrued upon date of hire. No prorated credit is due any employee who leaves County employment with less than one full year of county service.

- (a) After one (1) year, but less than six (6) years of continuous employment, a regular full-time employee shall have eighty (80) hours of paid vacation for use each year.
- (b) After six (6) years, but less than 14 years of continuous employment, a regular full-time employee shall have one-hundred twenty (120) hours of paid vacation for use each year.
- (c) After fourteen (14) years, but less than twenty-two (22) years of continuous employment, a regular full-time employee shall receive one-hundred sixty (160) hours of paid vacation for use each year.
- (d) More than twenty-two (22) years of continuous employment, a regular full-time employee shall receive one-hundred eighty-four (184) hours of paid vacation for use each year.

Vacation Accrual		
Years of Continuous Service Completed	Bi-Weekly Accrual (Hours)	Annual Accrual (Hours)
0-5	3.08	80
Greater than 5-13	4.616	120
Greater than 13-21	6.16	160
22+	7.08	184

Vacation may be taken in as little as one-half (½) hour increments.

Section 2. Each full-time employee must take vacation in the year following completion of the year of employment or lose vacation rights for the year unless vacation time has been denied by management. Requests for vacation are to be submitted to the Department Head on prescribed forms by the 15th of the month prior to the month the vacation is desired. This notification may be waived in the case of an emergency, and vacations shall be granted so as not to diminish the efficiency of the departments. In the event an employee wants a partial week vacation such as one-half (½) day or one (1) day vacation, permission must be obtained the previous day.

Section 3. All employees shall give a three (3) weeks’ notice in writing of their intention to voluntarily sever their employment with the County and upon failure to do so, any accumulation of pay except for time actually worked or as required by law shall be forfeited. Similarly, the County shall give the employees three (3) weeks’ notice in writing of any layoff.

Section 4. Seniority shall prevail in granting vacations when more than the usual number of employees desire their vacations at the same time.

Section 5. Any employee who is entitled to a vacation at the time of terminating services with the County shall receive accumulated vacation pay with the final paycheck.

Section 6. Employees may donate up to forty (40) hours of accumulated vacation time to a Monroe County employee who has a serious health condition as defined by the Family and Medical Leave Act. The 40 hour maximum is per donating employee per calendar year.

ARTICLE 14. SENIORITY

Section 1. The principle of seniority shall be taken into account in cases of layoff and recall, where vacation time requests conflict, promotion, transfer, reclassification and job posting. In the event that there shall be a layoff of employees, the employee with the least seniority shall be the employee laid off provided that the remaining employees shall have the capabilities to perform the employer's work. Recall from layoff shall be by seniority provided the employee recalled is capable of performing the available work.

Section 2. Seniority shall accrue from the first day of employment for a position covered under this agreement. An employee's seniority shall be terminated for any of the following reasons:

- A.** An employee quits or retires.
- B.** An employee is discharged for just cause.
- C.** An employee is laid off for a period of more than one (1) year without being recalled by the County.
- D.** An employee who has been laid off fails to report to work within seven (7) days after being notified to do so, unless such failure to report is beyond the employee's control.
- E.** If an employee is absent from employment for three (3) consecutive working days without notice to the employer, unless such failure to give notice is beyond the employee's control, provided, however, that this Section shall not affect disciplinary action against an employee for unexcused absence.

Section 3. In the absence of a Sergeant on any particular shift, the Patrol Deputy with the most seniority will assume the role of "Officer in Charge" (OIC) per Article 4, Section 4, B.

ARTICLE 15. CLASSIFICATION

Any reclassification on specific individual work assignments, other than as the result of disciplinary action or at the request of an employee or reclassification resulting from a reduction in the work force, shall not result in reduction of the individual employee's wages.

Wages, hours, and working conditions of any newly created work classification which are an appropriate part of the bargaining unit shall be subject to negotiations between Association and employer.

ARTICLE 16. JOB POSTING

Section 1. Whenever a vacancy occurs, or a new position is created, said vacancy or new position shall be posted for five (5) days in overlapping weeks on the bulletin board provided by the County for Association use. The posting shall set forth the job requirements, qualifications required and rate of pay. Interested bargaining unit employees shall sign the posting indicating such interest. Bargaining unit employees shall be

given first opportunity to fill such position openings provided they meet at least the minimum entry level qualifications for the position.

Probationary employees (employees who are on their initial hire twelve (12) month probation), are limited to the employer's outside hiring process; these employees may not utilize the posting process as do other bargaining unit employees. The employer must first comply with the job posting provisions for non-probationary employees before considering the outside hiring process.

Outside applicants may not be considered for an opening unless there exists no interested bargaining unit employee possessing at least the minimum entry level qualifications. Where qualifications of interested bargaining unit employees are substantially equal, seniority shall be the determining factor in deciding who shall be awarded the job. It will be the policy to fill positions with the best qualified candidate available with the attempt to provide County employees with career advancement opportunities.

Section 2. Employees on lay off shall be given first opportunity to fill any vacancy equivalent to or below the classifications they held prior to lay off, if qualified.

Section 3. Any employee who has completed the probationary twelve (12) months satisfactorily and is assigned to a new job classification, thereafter, shall serve an additional six (6) month probationary period in such new job classification, during which period the Department Head and/or Public Safety and Justice Coordinating Committee may terminate such employment in the new job classification and revert the employee back to the previous job classification for just cause. An employee who is reverted under this Section shall have the right to appeal such action directly to the Public Safety and Justice Coordinating Committee.

The successful applicant, if moving into a higher or lower pay rate, shall be paid the higher or lower rate on their first day in said position. Any employee may at any time during their initial sixty (60) day probationary period, elect to revert back to their previous job classification.

ARTICLE 17. PROBATION

Section 1. Whenever additional full-time employees are hired in the Sheriff's Department, they shall work in such position subject to a probationary period of twelve (12) months, during which period the Sheriff, after consultation with the Personnel Director, may terminate such employment for any reason. It is understood that the removal of a probationary employee does not require the same kind of charges and/or reasons that might be expected in the removal of an employee who had completed their term of probation.

ARTICLE 18. INSURANCE

Section 1. All members covered by this agreement shall be placed in the same health insurance plan as non-protective county employees. The County shall also offer single and family dental insurance to all employees who work at least 20 hours per week. Employees shall pay the same percentage contribution as non-protective county employees up to a maximum of fifteen percent (15%). The County may, during the term of this agreement, commence a self-funded insurance program or seek bids for different carriers.

Early retirees, who are eligible and draw a monthly annuity from the Wisconsin Retirement Fund through age 65, may remain in the health insurance group provided the retiree pays the full premium for the applicable coverage. After age 65, the retiree is eligible for an additional 18 months group coverage provided the retiree pays the full premium for the applicable coverage.

Section 2. Worker's Compensation Insurance shall continue to be provided by Monroe County. Fringe benefits will continue in full for the first fourteen (14) days of the period for which a worker may be receiving Worker's Compensation benefits beyond the initial fourteen (14) days, certain fringe benefits do not continue to accrue.

Examples of benefits which do not continue to accrue are retirement benefits, holiday pay, and vacation accrual. Sick leave shall continue to accrue for a maximum of one year (1) and then additional accrual shall cease if the employee is still under Worker's Compensation. The County's portion of health insurance will be continued for a maximum period of one (1) year, for employees eligible for Worker's Compensation due to work related injuries or illness. Additional extensions may be requested as per the provisions of Article 10, Section 2.

A. It is the intent of the parties that matters relating to temporary full or temporary partial disability be carefully and prudently assessed. The employee's as well as the employer's best interests will be considered when attempting to place the employee back on active duty. Medical opinion(s) as well as any other conditions that would affect job performance will be considered on a case-by-case basis. Should any of the above factors potentially affect the wages, hours or working conditions, outside of the current Collective Bargaining Agreement, of the employee affected, the County will meet with the Union in an attempt to resolve the issues.

B. Whenever an affected employee requests a light duty assignment, because of a condition necessitating such light duty, the employer shall, to the extent possible, accommodate the employee.

Section 3. The County shall provide false arrest insurance.

Section 4. The County shall provide each regular full-time employee covered by this Agreement with a \$10,000 term life insurance policy with AD&D effective at the same time the health insurance becomes effective for new employees. This coverage will be provided to regular part-time employees who may qualify under the guidelines as established by the insurance carrier.

ARTICLE 19. FUNERAL LEAVE

Section 1. Employees shall receive a three (3) day funeral leave with full pay for the death of a spouse, daughter, son, mother, father, sister, brother, mother-in-law, father-in-law, daughter-in-law, son-in-law, sister-in-law, brother-in-law, stepchild, stepparent, grandparent, grandchild or other relative who is a member of the employee's immediate household. Funeral leave shall be taken within a five (5) work day period (excluding scheduled days off), consisting of the two (2) work days immediately preceding and the two (2) work days immediately following the funeral. If there is a need to use funeral leave on a scheduled holiday, the holiday (excluding floating holiday) shall be taken as an extra day after the funeral leave, with approval of the employee's supervisor. An additional two (2) days of funeral leave in the case of the death of an immediate family member may be taken from an accumulated sick leave balance. These days shall be taken immediately preceding or following use of funeral leave.

Section 2. Employees shall receive one (1) day funeral leave with full pay for the death of a grandparent-in-law, aunt, niece or nephew of the first degree, if actually attending the funeral on a scheduled work day or holiday.

Section 3. Definitions for this article shall be as follows:

- A.** Immediate family member - spouse, child, or other relative who is a member of the employee's immediate household;
- B.** Nephew - son of employee's brother or sister or brother-in-law or sister-in-law;
- C.** Niece - daughter of employee's brother or sister or brother-in-law or sister-in-law;
- D.** Aunt - sister or brother's wife of employee's mother or father;
- E.** Uncle - brother or sister's husband of employee's mother or father.

Divorce severs in-law relationship.

Section 4. Employees shall receive a one-half (½) day funeral leave with full pay when attending a funeral as a pallbearer, and also shall receive a one-half (1) day funeral leave with full pay when attending a military funeral as a participant. Such attendance shall be limited to three (3) times per calendar year.

ARTICLE 20. RETIREMENT

Section 1. The County shall contribute to the Wisconsin Retirement Fund as stipulated by Wisconsin Law.

Section 2. Effective January 1, 2016 employees hired prior to July 1, 2011, shall contribute the full employee portion of the Wisconsin Retirement Fund contribution.

ARTICLE 21. MILITARY LEAVE

Section 1. Employees who are members of a military service shall be granted a leave of absence for their annual tour of two (2) weeks. Employees called to active duty shall be granted a military leave of absence.

Section 2. Employees receiving leave for annual two (2) week tours shall be paid the difference between their military pay and the pay they would have normally earned had they worked for the County.

Section 3. Employees drafted or ordered into military service shall be entitled to return to their former job at the current rate of pay with no loss in seniority and benefits, providing said employee returns to work within ninety (90) days of discharge from mandatory service. Seniority shall accrue while in the service on active duty.

ARTICLE 22. UNIFORM ALLOWANCE

Section 1. The County shall pay to full-time employees in the position of Patrol Deputy, Patrol Sergeant, Bailiff, Investigator, and Civil Process Deputy, a uniform allowance of six hundred dollars (\$600.00) per year; such uniform allowance to be payable on the second payroll in January for the year ensuing January for which said allowance is paid. All full-time employees who work part-time as a Patrol Deputy shall not receive any additional uniform allowance.

ARTICLE 23. ASSOCIATION ACTIVITY.

Section 1. Bulletin Boards: The County agrees to provide bulletin board space for the Association's use. The bulletin boards are to be used by the Association for notices only of the following: Association meeting, Association elections, Association appointments, Association recreational and social events, unemployment compensation information, and other materials of nonpolitical, noncontroversial nature.

Upon written demand from the County, the Association shall promptly remove from such bulletin boards any material which is libelous, scurrilous, or in any way detrimental to the labor management relationship. The County will retain ownership of the bulletin boards. In the event the Association fails to remove materials in violation of this Section, the County reserves the right to remove said material or the bulletin board upon which said material is posted.

Section 2. Association Business: Except as otherwise herein expressly permitted or agreed to by the County, Association business shall be transacted outside of the normal working hours. Grievances may be processed by an employee during working hours on County property provided they have the consent of the Department Head. In processing grievances, permission must be received from the Department Head before an employee shall leave a work area to conduct Association business, or before an Association representative may enter County property to conduct County business. The County reserves the right to exclude such meetings from any and all work areas of County property. Such meetings shall not interfere with the orderly and efficient operation of County business. Association membership meetings shall not be conducted on County property.

Section 3. Association Officials: The Association agrees to provide written notification to the County within seven (7) days following election or selection of Association representatives, stewards or other Association officials to enforce the Agreement.

Section 4. Use of County Facilities: The Association may have reasonable access to County facilities for purposes of holding bargaining planning sessions prior to scheduled negotiations with the County, for planning for mediation/arbitration sessions, or grievance hearings, provided the meeting consists of off-duty employees and their representative only and that it is held away from the law enforcement work site.

ARTICLE 24. NO STRIKE AGREEMENT

Section 1. Strike Prohibited: Neither the Association nor any of its officers, agents, or County employees will instigate promote, encourage, sponsor, engage in, or condone any strike, picketing, slow-down, concerted work stoppage, or any other intentional interruption of work during the term of this Agreement.

Section 2. Association Action: Upon notification by the County to the Association that certain of its members are engaged in a violation of this provision, the Association shall immediately in writing order such members to return to work, provide the County with a copy of such an order, and a responsible official of the Association shall publicly order them to return to work. In the event that a strike or other violation not authorized by the Association occurs, the Association agrees to take all reasonable, effective and affirmative action to secure the members return to work as promptly as possible. Failure of the Association to issue the orders and take the action required herein shall be considered in determining whether or not the Association caused or authorized the strike.

Section 3. Penalties: Any or all of the employees who violated any of the provisions of this Section may be discharged or disciplined by the County, including loss of compensation, vacation benefits, and holiday pay. In any arbitration proceeding involving breach of this provision, the sole question for the arbitration to determine is whether the employee engaged in the prohibited activity.

In addition to penalties provided herein, the County may enforce any other legal rights and remedies to which by law it is entitled.

ARTICLE 25. NONDISCRIMINATION

County and Association shall comply with the Federal and Wisconsin Law as to nondiscriminatory employment. Monroe County and the Monroe County Professional Police Association are committed to the principles of equal employment opportunities and practices for all persons regardless of age, race, sex, creed, ancestry, disability, arrest and conviction records, marital status, sexual preference or national origin, except where these factors constitute a bona fide occupational qualification.

Monroe County and said Association will act in a nondiscriminatory manner in all matters regarding personnel, which shall include, but is not limited to, the following: hiring, promotion, demotion, dismissal, disciplining, wage and fringe benefit policies, training, working conditions, and all other benefits of employment.

ARTICLE 26. JURY DUTY

An employee required to serve as a juror shall be paid their regular wages while serving as a juror, if it falls during the employee's normal work shift and the compensation paid to such employee for serving as a juror, excluding mileage, will be turned over to the employer. If the employee is required to serve as a juror during regularly scheduled off time, such employee shall be entitled to retain their jury fees.

ARTICLE 27. DAMAGE TO PERSONAL ITEMS

Employees who have eyeglasses, watches or other personal property broken or destroyed, provided said employee is acting within the proper scope of their duties when on active duty, shall have the damaged item restored to its pre-damaged condition prior to the incident. The employee shall fully cooperate with the Department Head and County in pursuing, by all means necessary, restitution from the assailant.

ARTICLE 28. ENTIRE MEMORANDUM OF AGREEMENT

Section 1. This Agreement constitutes the entire Agreement between the parties and no verbal statements shall supersede any of its provisions.

Any amendment supplemental hereto shall not be binding upon either party unless executed in writing by the parties hereto. The parties further acknowledge that during the negotiations which resulted in this Agreement, each had the unlimited right and opportunity to make demands and proposals with respect to any subject or matter not removed by law from the areas of collective bargaining and that the understandings and agreements arrived at by the parties after the exercise of that right and the opportunity are set forth in this Agreement.

Therefore, the County and the Union, for the life of this agreement, each voluntarily and unqualifiedly waive the right and each agree that the other shall not be obligated to bargain collectively with respect to any subject or matter not specifically referred to or covered in this Agreement, except for mandatory subjects of bargaining within the meaning of Wisconsin Statutes 111.70, even though such subject may not have been within the knowledge and contemplation of either or both of the parties at the time that they negotiated or signed this Agreement.

Waiver of any breach of this Agreement by either party shall not constitute a waiver of any future breach of this Agreement.

Section 2. If any Article of this Agreement or any additions thereto should be held invalid by operation of law or by any executive, legislative, administrative or judicial action, or if compliance with or enforcement of any Article or section should be enjoined or restrained by such operation of law or executive, legislative, administrative or judicial action, the remainder of this Agreement and amendments thereto shall not be affected thereby, and the parties hereto shall enter into immediate collective bargaining negotiations for the purpose of arriving at a mutually satisfactory replacement for such Article or Section.

ARTICLE 29. DURATION OF AGREEMENT

This Agreement shall become effective January 1, 2024, and shall remain in full force and effect through December 31, 2025. Contract negotiations for 2026, shall begin, as is practical. Additionally, this Agreement shall further continue in full force and effect thereafter, from year to year, unless written notice is given by either party of an intent to bargain, at least one hundred twenty (120) days prior to the last day of each year.

2024 – 2025 LAW ENFORCEMENT CONTRACT

WITNESS OUR HANDS AND SEALS THIS 30th day of August, 2023, in the City of Sparta, County of Monroe, State of Wisconsin.

MONROE COUNTY BARGAINING
COMMITTEE:

MONROE COUNTY PROFESSIONAL
POLICE ASSOCIATION

Wallace Habegger

Marcus Badger, Interim Union President

Toni Wissestad

Michael Backus, Business Agent
WPPA/LEER

James Kuhn

Ed Smudde
Personnel Director

RESOLUTION NO. 08-23-06

RESOLUTION AUTHORIZING THE MONROE COUNTY HEALTH DEPARTMENT TO EXPLORE OBTAINING ENVIRONMENTAL HEALTH AGENT STATUS FROM THE STATE OF WISCONSIN DEPARTMENT OF AGRICULTURE, TRADE & CONSUMER PROTECTION

- 1 **WHEREAS**, Wisconsin Statute Sec. 97.615(2)(b) & 97.41(1m) authorizes the Department of
2 Agriculture, Trade & Consumer Protection to enter into an agreement with a local health department
3 and designate that local health department as the agent of the Department of Agriculture, Trade &
4 Consumer Protection for the purpose of issuing licenses and conducting investigations and inspections;
5 and
6
- 7 **WHEREAS**, part of the environmental health duties would be to offer services that enhance the well-
8 being, health and safety of the community; and
9
- 10 **WHEREAS**, the Monroe County Health Department environmental health professionals can establish a
11 growing, working relationship with local facilities to answer questions and work together to solve issue;
12 and
13
- 14 **WHEREAS**, annual inspections can prompt complaint responses and establish food and sanitation
15 standards providing protection for consumers; and
16
- 17 **WHEREAS**, the Monroe County Health Department environmental health professionals are valuable
18 resources for questions in the areas of lead, radon, mold, asbestos, and mercury; and
19
- 20 **WHEREAS**, currently not all Monroe County establishments are being inspected annually which is also
21 one of the reasons that the State of Wisconsin is encouraging local health departments to become
22 agents for the State of Wisconsin; and
23
- 24 **WHEREAS**, the annual license fees generated from these inspections are anticipated to sustain this
25 program; and
26
- 27 **WHEREAS**, reinvesting license fees back into the local economy keeps these monies in our
28 community; and
29
- 30 **WHEREAS**, public health concerns are increasing and changing rapidly and local health departments
31 working in partnership with State agencies to oversee food, lodging and recreational facilities provides
32 an ideal infrastructure to best meet current and upcoming challenges.
33
- 34 **THEREFORE BE IT RESOLVED** that the Monroe County Board of Supervisors does hereby approve and
35 does hereby direct the Monroe County Health Department to explore the process of becoming a
36 designated agent for environmental health through the State of Wisconsin Department of Agriculture,
37 Trade & Consumer Protection.

Dated this 30th day of August, 2023.

OFFERED BY THE HEALTH & HUMAN SERVICES COMMITTEE.

Fiscal note: No money will be necessary for this exploration phase.

Statement of purpose: To allow the Monroe County Health Department to begin to explore becoming an approved environmental agent through the State of Wisconsin Department of Agriculture, Trade & Consumer Protection.

RESOLUTION No. 08-23-07

AUTHORIZING MONROE COUNTY LAND CONSERVATION DEPARTMENT TO SUBMIT APPLICATION TO THE SURFACE WATER GRANT PROGRAM AND ENTER A GRANT AGREEMENT TO COMPLETE AN OPEN SPACE SHORELAND PROTECTION PROJECT ALONG THE LITTLE LA CROSSE RIVER

1 **WHEREAS**, Monroe County is interested in obtaining a cost-share grant from the Wisconsin Department
2 of Natural Resources for the purpose of completing an open space shoreland protection project along the
3 Little La Crosse River to improve stream health and floodplain management; and
4

5 **WHEREAS**, Monroe County will ensure the statements and representations contained in the grant
6 application are accurate and complete; and
7

8 **WHEREAS**, a grant agreement must be completed to carry out the project; and
9

10 **WHEREAS**, the Monroe County Land Conservation Department will address the required administrative
11 reporting for the project and will assign the following officials or employees to submit the following
12 documents to the Wisconsin Department of Natural Resources (WIDNR) for financial assistance that may
13 be available:

Task	Title of Authorized Representative(s)	Email Address and Phone Number if alternative is used
Sign and submit grant application	Land Use Planner	Roxie.anderson@co.monroe.wi.us 608-855-5020
Enter into a grant agreement with the WIDNR	Land Conservation Department Director	Bmicheel@co.monroe.wi.us 608-269-8975
Submit quarterly and/or final reports to the WIDNR to satisfy the grant agreement, as appropriate	Land Use Planner	Roxie.anderson@co.monroe.wi.us 608-855-5020
Submit reimbursement request(s) to the WIDNR no later than the date specified in the grant agreement	Land Use Planner	Roxie.anderson@co.monroe.wi.us 608-855-5020
Sign and submit other required documentation	Land Use Planner or Land Conservation Department Director	Roxie.anderson@co.monroe.wi.us 608-855-5020 Bmicheel@co.monroe.wi.us 608-269-8975

14 **NOW, THEREFORE, BE IT RESOLVED**, that the Monroe County Board of Supervisors authorizes the
15 Monroe County Land Conservation Department to make application for the surface water grant program
16 as set out above and to enter a grant agreement to complete an open space shoreland protection project
17 along the Little La Crosse River; and
18

19 **BE IT FURTHER RESOLVED** that Monroe County will comply with all local, state, and federal rules,
20 regulations and ordinances relating to this project and the cost-share agreement.

Dated this 30th day of August, 2023

Offered by the Natural Resource & Extension Committee.

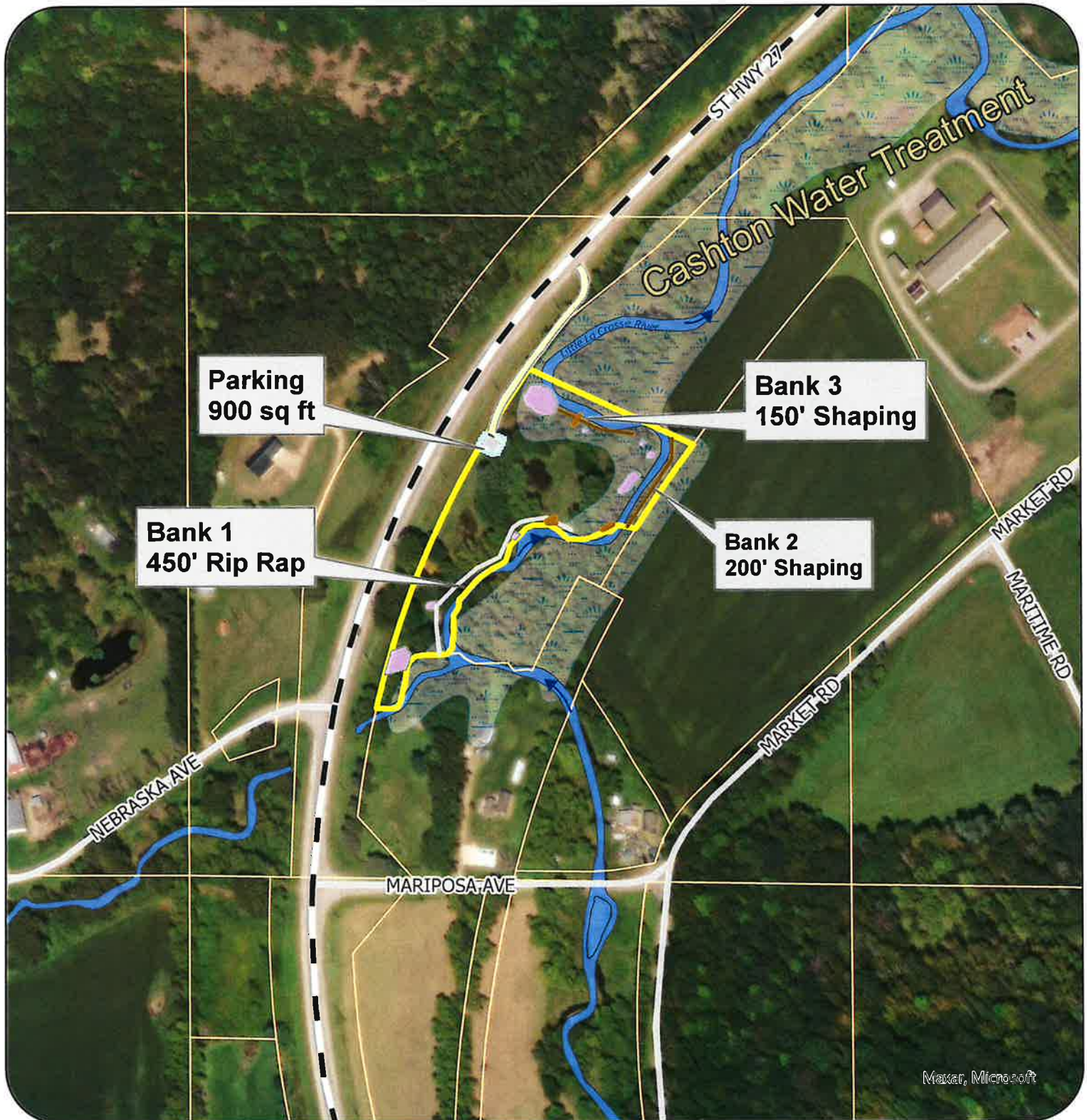
Fiscal Note: Grant revenue and expenses will require budget adjustments if and when grant is awarded.

Purpose: To obtain a cost-share grant from the Wisconsin Department of Natural Resources to complete an open space shoreland protection project along the Little La Crosse River to improve stream health and floodplain management.

Drafted by: Roxie Anderson, Land Conservation Department and Dirk Lueck, GIS Intern

<p>Finance Vote (If required): <u>4</u> Yes <u>0</u> No <u>1</u> Absent</p> <p>*****</p> <p>Approved as to form: <u>8/11/2023</u> <u>Lisa Aldinger Hamblin</u> Lisa Aldinger Hamblin, Corporation Counsel</p>	<p>Committee of Jurisdiction Forwarded on: <u>August 9</u>, 20<u>23</u> VOTE: <u>4</u> Yes <u>0</u> No <u>1</u> Absent</p> <p>Committee Chair: <u>Paul A. Preece</u> <u>Joy Estel line</u></p>
<p><input type="checkbox"/> ADOPTED <input type="checkbox"/> FAILED <input type="checkbox"/> AMENDED <input type="checkbox"/> OTHER _____</p> <p>County Board Vote on: _____ 20__ ____ Yes ____ No ____ Absent</p>	<p>STATE OF WISCONSIN COUNTY OF MONROE I, SHELLEY R. BOHL, Monroe County Clerk, DO HEREBY CERTIFY that the foregoing is a true and correct copy of Resolution # _____ acted on by the Monroe County Board of Supervisors at the meeting held on _____.</p> <p>_____ SHELLEY R. BOHL, MONROE COUNTY CLERK <i>A raised seal certifies an official document.</i></p>

Open Space Property Streambank Project



Maxar, Microsoft

Customer(s): Monroe County
 Legal Description: T15N, R4W Sect. 12
 Township: Portland
 Field Office: SPARTA SERVICE CENTER
 Agency: MONROE COUNTY LCD
 Assisted By: Dirk Lueck

- | | |
|--|--|
|  Face Rock |  Entrance |
|  Flood Debris |  Invasives |
|  Rip Rap Banks |  Designated Parking |
|  Tree Clearing and Bank Shaping |  Mapped Wetland |



Monroe County
Strategic Plan
July 2023

www.co.monroe.wi.us

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Economic Development and Growth

Quality Services

Strong Infrastructure

Monroe County

STRATEGIC PLANNING COMMITTEE

Toni Wissestad

Chair



Zach Zebell

Vice Chair



Cedric Schnitzler

County Board Chair



Adam Balz

District 11



Todd Sparks

District 9



Jason Jandt

District 4



Strategic Planning Team and Facilitators

Tina Osterberg

County Administrator



Adrian Lockington

Executive Assistant



Shelley Bohl

County Clerk



Information about the Strategic Plan is available online at www.co.monroe.wi.us/StrategicPlan.

You also may contact the Monroe County Administration Department at 608-269-8006 from 8:00 a.m. to 4:30 p.m.

Monday – Friday, or visit the office at 124 N Court St. Sparta, WI 54656.

Message from the County Administrator

TINA OSTERBERG

A strategic plan is a roadmap for how Monroe County directs resources to achieve a defined vision for the future. Monroe County's Strategic Plan identifies 5 specific pillars, clarifying which 21 broad objectives are most important over the next 5 years.

The development of the 2023-2028 strategic plan was a collaboration of county board supervisors, staff, municipal leaders, and community members. In January 2023, 6 county board supervisors were appointed to the newly developed strategic planning committee. They set guidelines and initiatives to set the road map for the development of the plan.

With common themes presenting themselves during the department head and board of supervisor strengths, weaknesses, opportunities and threats (SWOT) analysis meetings, a mission and vision statement evolved. Working within the guidance of the newly developed countywide mission and vision statements, the Strategic Plan started to take shape.

The Board of Supervisors adopted the following elements of the Countywide Strategic Plan on August 30, 2023: The Five Pillars, Fiscal Responsibility, Health and Safety, Tourism and Economic Development Growth, Quality Services, and Strong Infrastructure. The Board also adopted a set of objectives, as well as proposed strategies to accomplish the overarching pillars. The County Administrator will work with departments in establishing measurable progress over time on each of the strategies. The Strategic Plan will continue to evolve over the coming months and years as a living document. It is anticipated as objectives are met, new objectives will rise to the forefront bringing forward a continuous process to guide the future of our county, to ensure that all community members, partners, and employees are working together towards the same vision.

As we work towards our overreaching mission and vision, we need to empower the staff to carry out the objectives of the strategic plan. We recognize that one of our greatest strengths is our team of highly skilled, educated, dedicated, and passionate staff. We must create an environment where staff skills are enhanced and innovation is encouraged to carry out our mission.

We look forward to working with all staff to grow a better tomorrow for Monroe County through fiscal responsibility, health and safety initiatives, tourism and economic development growth, providing quality services, and implementing strong infrastructure.

MISSION STATEMENT

The mission of Monroe County is to promote Health, Safety, and Quality of life for our residents. We are committed to providing sustainable, efficient, professional services while seeking opportunities through reliable infrastructure, innovative growth, and fiscal responsibility.

VISION STATEMENT

Monroe County, Growing a Better Tomorrow



ORGANIZATIONAL CULTURE

As we work toward our goal of being the healthiest, safest and most prosperous county, we recognize that one of our greatest assets is our team of county government employees. We know that to succeed, we need to create an environment that has skill, talent development and empowers employees to improve our existing services and develop new and innovative solutions to better serve our residents and the public.

CORE VALUES

The following core values are principles for which we stand and provide direction on how people are to conduct themselves as representatives of Monroe County.

SERVICE

- Responsively delivering on our commitments to all our of internal and external customers.

DIVERSITY

- Actively welcoming and valuing people with different perspectives and experiences.

INTEGRITY

- Honest, openness, and demonstrating mutal respect and trust in others.

SHARED PURPOSE

- Function as a team to attain our organizational goals and work collaborativley with our policy makers, deparments, employees and customers.

STEWARDSHIP OF OUR RESOURCES

- Conserving the human, natural, cultural and financial resources for current and future generations.



History of Strategic Planning in **MONROE COUNTY**

The concept of the Strategic Plan was conceived from County Supervisors agreeing to set long term goals for our County. Gathering ideas from the Community, Employee's and County Supervisors evolved into five pillars of planning. The plan will identify specific projects for each core strategy and will be identified for administration implementation.





DEPARTMENT HEAD & STAFF

To start the planning process Monroe County Department Heads were provided questions to discuss with their staff in late February. With internal department discussions, feedback was brought forward to a strategic planning session in early March. During this strategic planning session, department heads were broke out in groups to discuss Monroe County's strengths, weakness, opportunities, and threats (SWOT).



COUNTY BOARD

A staff facilitated strategic planning session follow for the supervisors, who broke out in groups to complete a separate SWOT analysis. They were given XX questions to discuss in their groups and write down on sticky notes to be added to the list.

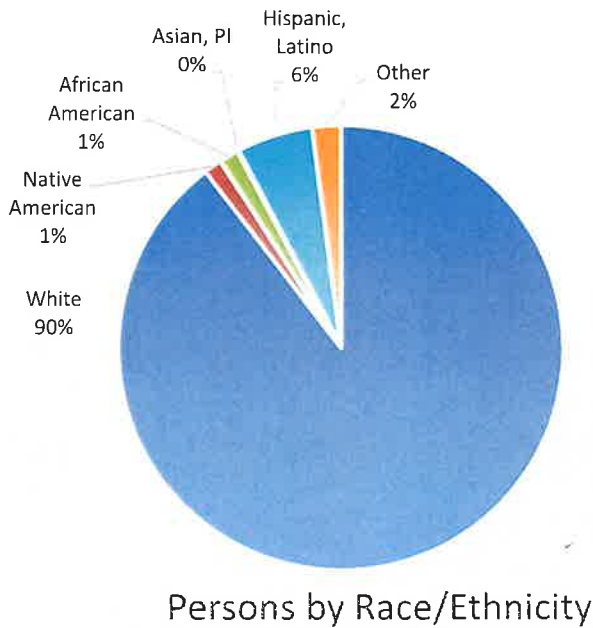


COMMUNITY

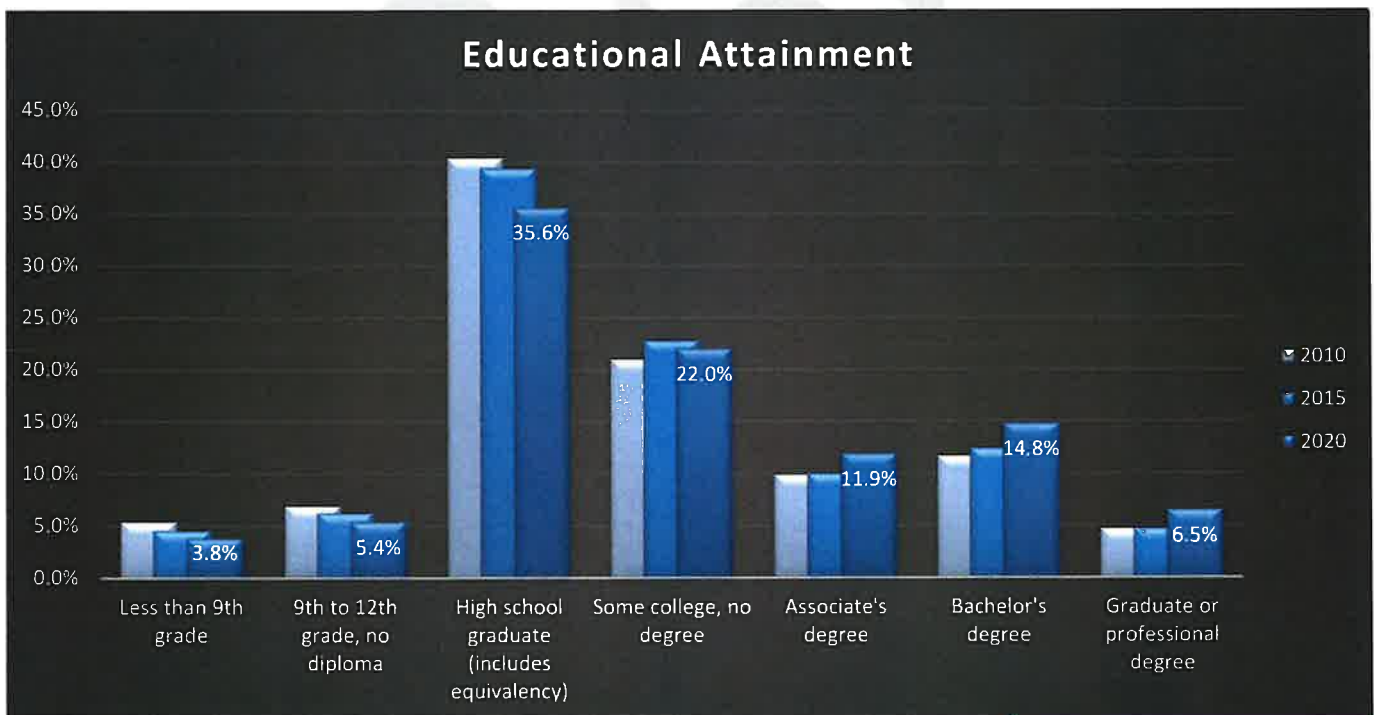
The strategic planning process included outreach to the communities in which committee members presented draft strategic plans and acquired advice on items that could be added or improved in the plan. Each of these community events provided the committee with relevant information to consider as the plan was being finalized.

Monroe County

COMMUNITY PROFILE



<p>1100</p> <p>Private Business Establishments (2021)</p>
<p>2.7%</p> <p>Unemployment Rate (2022)</p>
<p>\$62,742</p> <p>Median Household income (2021)</p>
<p>\$876</p> <p>Average monthly rent for a two bedroom apartment (2021)</p>

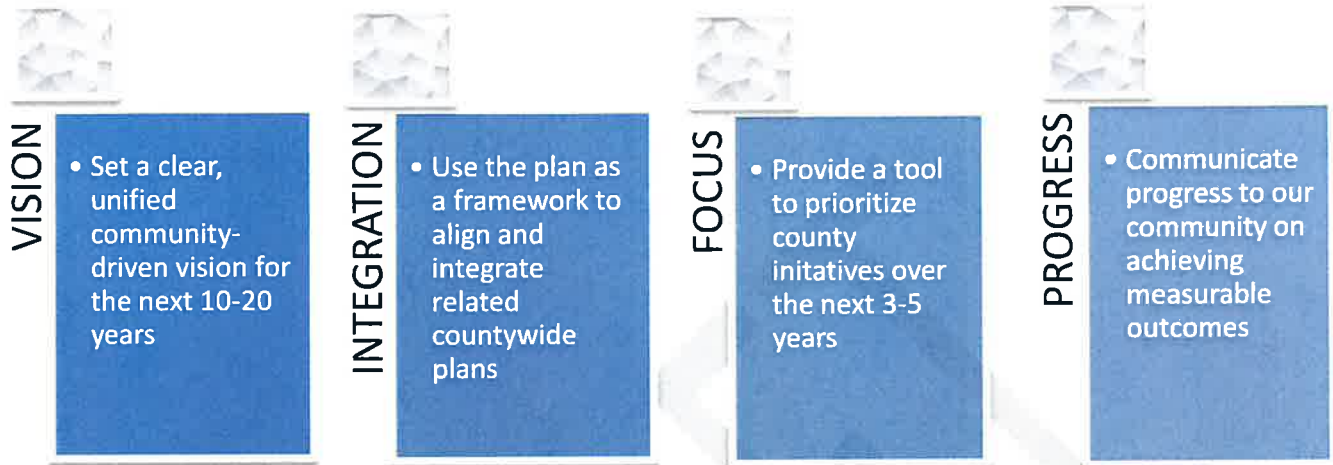


% in Poverty	2018	9.2%	 	2021	8.30%
Under Age 18 % in Poverty	2018	12.6%	 	2021	11.0%

POPULATION
 2020 | 46,274
 2010 | 44,673

GOALS AND DRIVERS

The following goals and drivers guided the development of the Countywide Strategic Plan and will continue to shape our future work as a county and as a community:



KEY THEMES



The proposed strategies were developed based on the extensive background work completed by the Strategic Planning Committee and Team. A process will be implemented to ensure measurable outcomes. This process will be highly flexible and will adapt to respond to community conditions as they evolve over time.

FISCAL RESPONSIBILITY



Fiscal Responsibility

Maintaining fiscal responsibility while providing sustainable services to the citizens we serve is critical. We must be mindful of the tax burden incurred by those we serve and those looking to make Monroe County home for their family or business. In an environment where the County's revenue increases are limited by the State imposed levy cap, it is imperative that we look to operational efficiencies through consolidation of buildings, departments, programs, services, and staff sharing.

Through risk management practices we can seek to mitigate potential fiscal impacts resulting from adverse incidents. These can be practiced through regular policy and claims review, education, and staff training.

As we plan for the future, regular review of policies, service fees, staff wages and benefits, along with long-term capital planning is imperative to the future health of the county finances and services.

PROPOSED STRATEGIES

Annual Review of Finance Policies

- Finance Committee Review of General Cash Fund Balance Policy
 - Future debt service payments - 2028 Justice Center/Tower bond payments complete
- Finance Committee Review of Financial Policy and Procedure Manual

Formalize a Long-Term Capital Plan

- Analyze feasibility & development of unified capital expenditure fund
- Create and update annually each year after, a 10 year Long-term County-wide capital plan
- Continue to develop the highway capital improvements program and report an updated five year capital plan annually at a county board meeting
- Highway Capital Improvements
 - Department report & updated 5 year capital plan presentation at annual county board meeting
 - Funding Options – Issue Bonding

Risk Management

- Liability insurance
 - Annually review liability insurance plan and claims by finance committee
 - Continue discussions for consolidation and/or updated buildings
- Self-funded health plan
 - Annually review self-funded health plan by administrative and personnel committee
 - Increase Board knowledge of health insurance plan through annual update from Insurance Center

- Seek out additional annual Insurance Center trainings for staff education
- To get 50% of staff participation in wellness plan by August 2024 – reduced premiums to staff based on wellness results – reduced claims
- Workers’ compensation self-funding account review
 - Annually review with insurance carrier of claims by finance committee
 - Annually review workers’ compensation rates and plan by finance committee
 - Continue enhancing safety awareness through safety committee initiatives
 - Conduct annual policy review by safety committee
 - Provide opportunities for staff education
 - Hire Risk/Safety Manager position – funded partially by reduction of Willis risk compliance contract

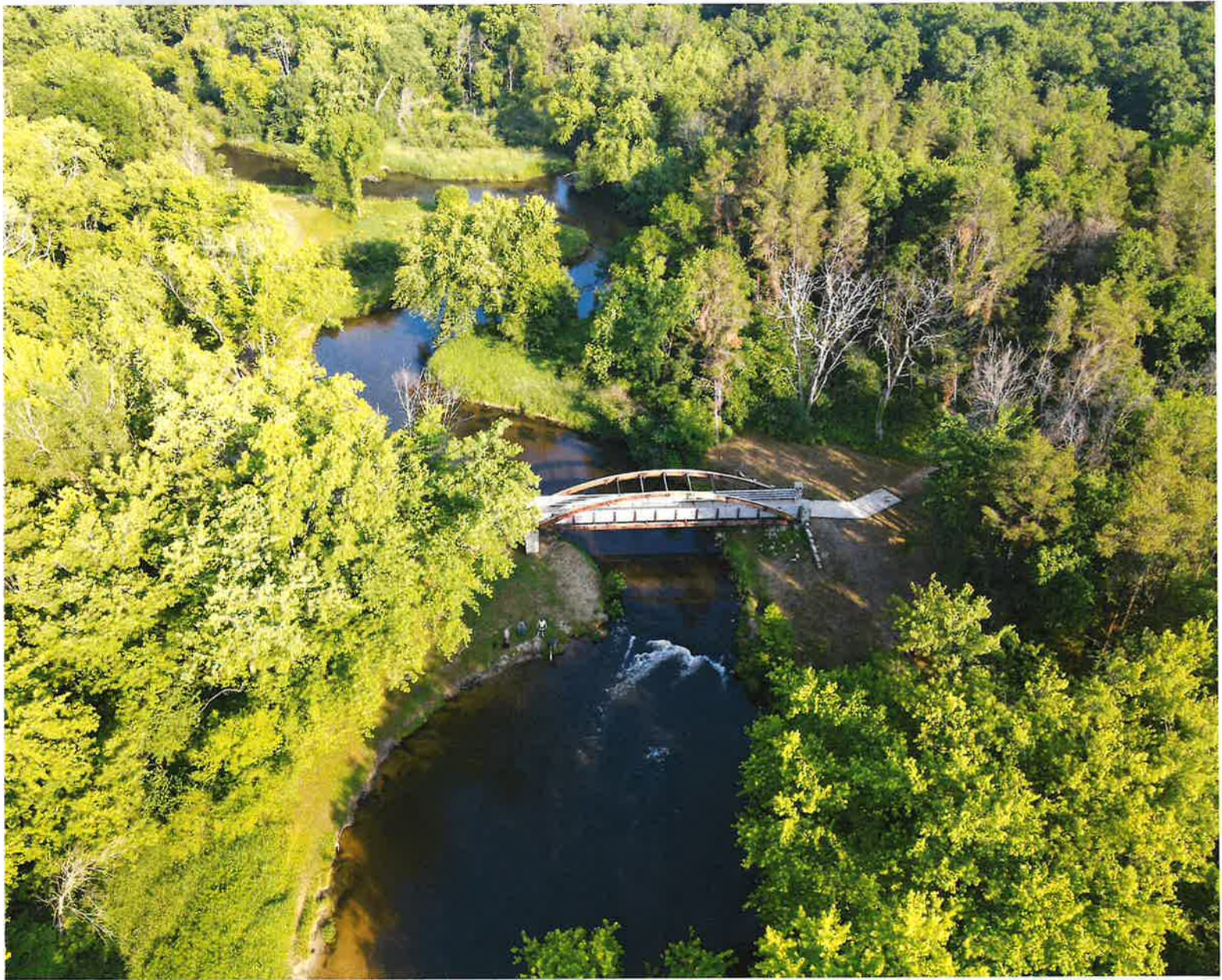
Sustainable Fiscal Health

- Inform Supervisors, Staff, and Public on County Revenues and Expenses
- Develop Annual Balanced Budgets
 - Annual review of service fees
 - Self-sustaining fees – create policy/rate setting and review – May 31st of each year
 - Ensure ARPA funded wage increases are funded
 - Future wage and benefit increases
 - Utility cost increases
 - Capital needs
 - Secure state and federal funding
 - Inform area managers on how to secure funding – dos and don’t

Consolidation Efficiency

- Comprehensive Facilities Assessment of Building Foot Print
- Conduct comparison of maintaining current county buildings
- Programs
 - Mandated
 - Non-mandated
- Explore contracting out services
- Review possibility of consolidation of departments
- Review Department Head positions through attrition upon retirement/resignation
- Staff
 - Cross training of staff
 - Time study
- Enhance automation throughout departments to better serve public

HEALTH AND SAFETY



Health and Safety Introduction

To meet the needs of all Monroe County residents, we must ensure a diverse approach to the Health and Safety of the community. Health and Safety requires investing in all aspects to include; mental health, financial stability, and resilience capability in the place where residents live and thrive.

PROPOSED STRATEGIES

Support a Healthy Community

- Seek ways to continue to expand and fund mental health services
- Create a pathway for building and enhancing access to facilities to house residents seeking mental health services
- Promote child and teen mental health by partnering with schools to set policies encouraging the use of county services

Expand Access to Safe and Affordable Housing

- Collaborate with local landlords to better understand the needs of residents seeking safe and affordable housing
- Pursue grant opportunities to support safe and affordable housing
- Address the increasing homeless population

Improve Community Resilience Through Enhanced Prevention and Preparedness

- Develop and implement risk-reduction programs to mitigate loss of life, property and resources associated with emergencies and other county-wide disasters
- Enhance rural and community school safety and assess the need for school resource officers
- Improve communication systems throughout the county for enhanced emergency response
- Expand a second 911 communication center on the east side of Monroe County
- Partner with and implement the Climate Change Task Force (CCTF) strategies

Enhance Access to Substance Abuse and Mental Health Services

- Create educational pathways via technology and face-to-face interaction to improve harm reduction
- Partner with school districts to provide education and surveillance to improve student outcomes
- Construct a technology center that will allow residents seeking assistance the opportunity
- Recruit and retain professionals to assist in providing substance abuse services
- Establish partnerships in the community to address the increased use of substance abuse materials

Provide Access to Clean Water

- Work with local municipalities experiencing clean water concerns
- Continue to provide education on programs Monroe County offers to ensure safe drinking water

ECONOMIC GROWTH AND TOURISM



Economic Growth and Tourism

A county is only as strong as its economy, and a strong economy depends on people. This means people who own or want to own—their own businesses, as well as their employees and customers. A strong economy also depends on people who come to Monroe County as visitors, and those who decide to move here and call Monroe County "home." Over the next five years, we can grow Monroe County's economy by strengthening our existing businesses while also attracting new businesses, expanding opportunities for tourism and recreation, and developing the infrastructure needed to encourage more people to move to here.

PROPOSED STRATEGIES

Enhance Recreational Opportunities

- Update recreational maps on an annual basis
- Continue development of county parks, including the Town of Byron/Hi-Crush property, and identify sources of funding
- Implement Land Use Plan recommendations for the development of the Tri-Creek Property, and identify sources of funding
- Identify county-owned properties that can be developed into primitive or backpack campsites, as well as areas in which current camping opportunities can be expanded
- Explore alternate recreational opportunities (mountain biking, ATV/UTVs, hunting, fishing, etc.)
- Encourage development of recreational opportunities in municipalities, including town/village parks, swimming centers, skate parks, etc.
- Work with neighboring counties to connect recreational trails (ATV/UTV, snowmobile, etc.)
- Collaborate with school districts to build more recreational opportunities into curriculum, expand co-curricular activities, and partner with new or existing clubs

Maximize Economic Development

- Develop a strategy to advertise existing businesses across multiple platforms
- Broaden current partnerships with regional planning organizations and establish new partnerships to strengthen communication and collaboration
- Establish stronger partnerships with local chambers of commerce
- Conduct a survey of county businesses to assess their needs and successes, as well as the roadblocks they face when it comes to growth
- Pursue funding opportunities for high-speed broadband

Boost Tourism

- Explore feasibility of contracting for tourism
- Expand social media and digital presence to increase tourism
- Utilize advertising along the interstate, with a focus on billboards, to encourage more travelers to visit

- Assist municipalities in promoting events to increase tourism, with a focus on rural communities who don't have the resources to promote themselves
- Diversify tourism messages to appeal to a wider range of audiences
- Develop a plan to make county-owned museums, parks, and public spaces more accessible
- Brainstorm and execute new marketing strategies, including slogans and merchandise, which differentiate Monroe County from surrounding counties and "destinations"

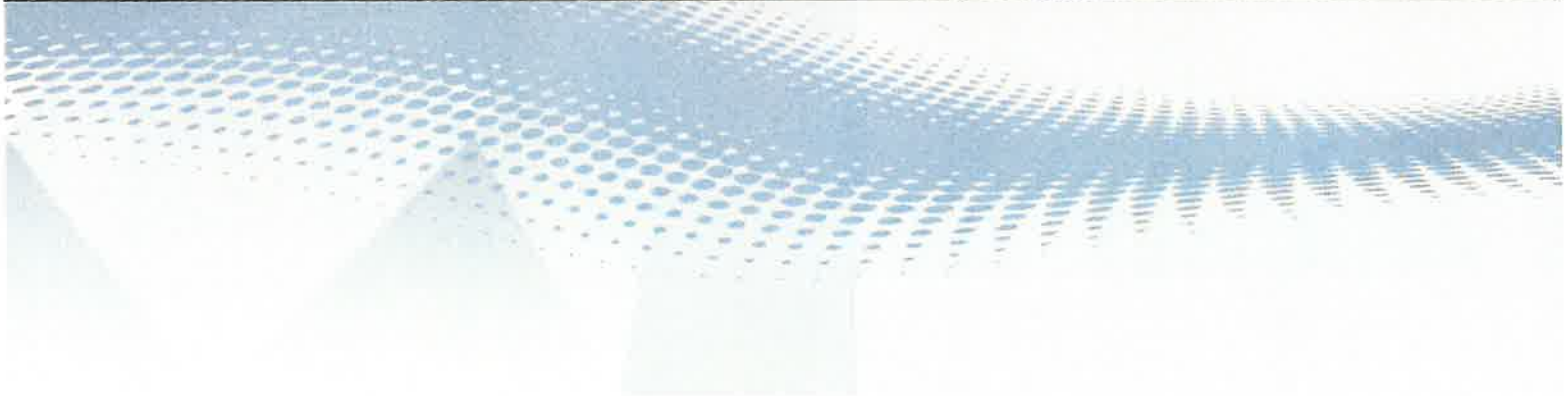
Expand Access to Affordable Childcare

- Invite stakeholders to a forum with county officials to discuss needs, trends, barriers to childcare, and solutions (with actionable items)
- Explore possible public-private partnerships between local childcare providers, local businesses, county departments, and other interested parties
- Research possible incentives for local businesses to provide employees with childcare vouchers
- Review possible subsidies for families receiving Wisconsin Shares child care subsidy copayments
- Survey possible on-site childcare options for county employees
- Study the financial feasibility of grants for home-based providers

Provide Housing Opportunities for Monroe County Residents

- Invite stakeholders to a forum with county officials to discuss needs, trends, barriers to housing, and solutions (with actionable items)
- Explore development opportunities for the old Rolling Hills property
- Evaluate current zoning ordinances that may restrict or prohibit housing development, and develop new ordinances to promote housing development

QUALITY SERVICES



Quality Services

Monroe County seeks new ways to improve, becoming increasingly more proactive, reactive to change and responsive to all the residents we serve in providing quality services. To be effective and efficient the county needs well-functioning facilities, secure technology that meets the needs of employees and residents, and an outstanding workforce. To succeed into the future, Monroe County must constantly reinforce a culture that supports employees to become more data-driven, service oriented, collaborative, and adaptable to change. Leadership and staff at all levels must effectively communicate, continuously build on lessons learned, benchmark for best practices and seek new and improved ways to serve the community.

PROPOSED STRATEGIES

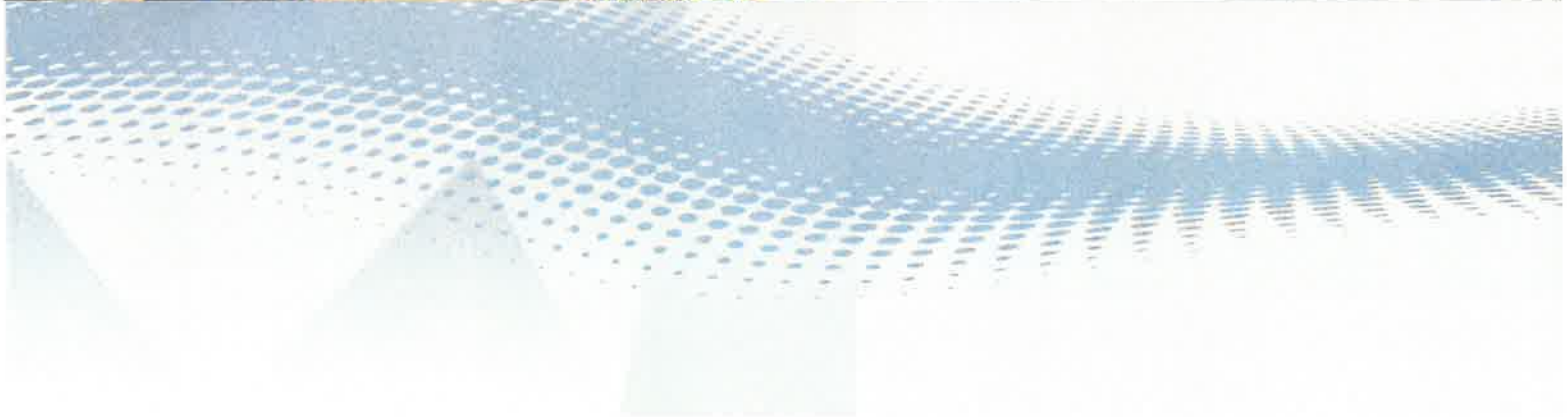
Provide Quality Services

- Provide educational opportunities for employees to enhance customer service skills
- Utilize a customer satisfaction survey to capture residents comments and report quarterly
- Partner with organizations to build collaborative relations to benefit all
- Enhance communication efficiencies by addressing languages barriers

Create a Workplace that attracts the Best Employees

- Implement a competitive wage and benefit package to attract and retain the best employees
- Complete a wage study every three years to stay competitive in the industry
- Provide opportunities to enhance employee relations (appreciation program)
- Explore opportunities to improve employee wellness
- Create and implement strong succession planning strategies
- Enhance education opportunities to improve employee wellness

STRONG INFRASTRUCTURE



Strong Infrastructure

Infrastructure is the backbone for continued Economic Growth and Development in Monroe County. Expanding and improving access to transportation, improved roads and bridges, communication technologies, and clean water is essential to the success of a community. Strong infrastructure allows for communities to attract new businesses which will directly impact and promote economic growth through the creation of jobs.

PROPOSED STRATEGIES

Consolidate county offices into one centralized building

- Complete a space and resource needs assessment

Expand Broadband across the county and update the service map semi-annually

- Facilitate improving broadband access
- Continue to explore funding opportunities and public private partnerships
- Provide continual updates to community and seek input on service needs

Update the county department's webpages annually

- Keep the residents informed on department services to improve communication

Review, revise, and distribute the Highway Departments 10-year strategic plan annually

- Provide access to plan and allow community engagement

Improve, enhance and continuously invest in safe, reliable, accessible and well-maintained transportation infrastructure

- Safety strategies that include design, measure and tracking goals and objectives
- Assess and mitigate impacts on environment and climate change

Support a transportation network that is future focused to meet the ongoing needs of the communities

- Identify the needs for the future and how to use data informed decision making plans

Support convenient, reliable, safe and economical public transit options that are accessible

- Explore innovative initiatives for our future transportation infrastructure

STRATEGIC PLAN PILLARS



MONROE COUNTY BOARD OF SUPERVISORS

2022 - 2024



Back Row: Jason Jandt, Zach Zebell, James Kuhn, Adam Balz, Eric Devine, David Kuderer, Remy Gomez, Cedric Schnitzler
Center Row: Todd Sparks, David Pierce, Wally Habhegger, Doug Rogalla
Front Row: Joey Esterline, Mary Cook, Nodji VanWychen, Toni Wiessstad



Growing a Better Tomorrow.

A publication of Monroe County, Wisconsin.

July 2023

RESOLUTION NO. 08-23-08

RESOLUTION TO APPROVE THE STRATEGIC PLAN FOR MONROE COUNTY

1 WHEREAS, the Monroe County Board of Supervisors previously established a Strategic Planning Committee;
 2 and
 3
 4 WHEREAS, that Strategic Planning Committee has completed a Strategic Plan for Monroe County; and
 5
 6 WHEREAS, it is the determination of the Monroe County Board of Supervisors that the findings and
 7 recommendations of the Strategic Planning Committee contained in the attached Strategic Plan are in the best
 8 interests of Monroe County; and
 9
 10 WHEREAS, the Administration/Personnel Committee be designated the committee of jurisdiction effective
 11 January 1, 2024.
 12
 13 NOW THEREFORE BE IT RESOLVED by the Monroe County Board of Supervisors that they do hereby adopt the
 14 attached Strategic Plan for Monroe County as developed by the Monroe County Strategic Planning Committee.
 15
 16 FURTHER BE IT RESOLVED Administration/Personnel is the designated Committee of jurisdiction.

Dated this 23rd day of August, 2023.

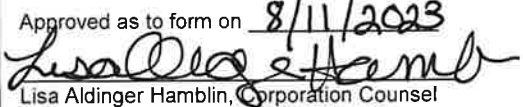
Offered By the Administrative & Personnel Committee.

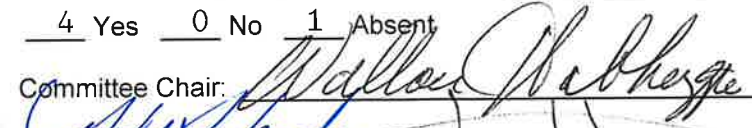

Fiscal note: None

Statement of purpose: To approve the Strategic Plan developed by the Monroe County Strategic Planning Committee.

Finance Vote (If required):
 ___ Yes ___ No ___ Absent

Committee of Jurisdiction Forwarded on: August 8, 2023
 ___ 4 ___ Yes ___ 0 ___ No ___ 1 ___ Absent

Approved as to form on 8/11/2023

 Lisa Aldinger Hamblin, Corporation Counsel

Committee Chair: 


ADOPTED FAILED AMENDED
 OTHER _____
 County Board Vote on: _____ 20____
 ___ Yes ___ No ___ Absent

STATE OF WISCONSIN
 COUNTY OF MONROE
 I, SHELLEY R. BOHL, Monroe County Clerk, DO HEREBY CERTIFY that the foregoing is
 a true and correct copy of Resolution # _____ acted on by the Monroe
 County Board of Supervisors at the meeting held on _____.

 SHELLEY R. BOHL, MONROE COUNTY CLERK
 A raised seal certifies an official document.

RESOLUTION NO. 08-23-09

RESOLUTION APPROVING METHOD FOR IMPLEMENTATION AND MONITORING OF THE STRATEGIC PLAN

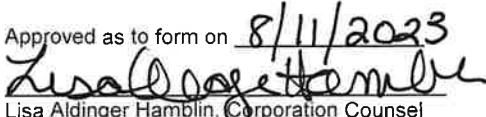
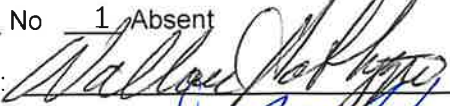
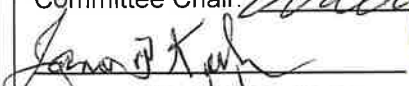
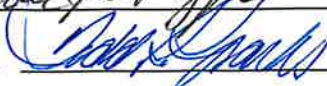
1 WHEREAS, The Monroe County Board of Supervisors has approved the strategic plan as developed by the
 2 Monroe County Strategic Planning Committee; and
 3
 4 WHEREAS, the Monroe County Board of Supervisors must determine how the strategic plan will be implemented
 5 and how the goals of the strategic plan will be achieved; and
 6
 7 WHEREAS, the implementation of this plan will involve standing County Board Committees and decisions as to
 8 how and when those committees will meet to implement this plan.
 9
 10 THEREFORE BE IT RESOLVED that the Monroe County Board of Supervisors does hereby determine that the
 11 Strategic Planning Committee shall hereby be dissolved effective January 1, 2024.
 12
 13 BE IT FURTHER RESOLVED that effective that same date, the committee of jurisdiction for the implementation of the
 14 strategic plan shall be the Administrative & Personnel Committee. The chairperson of the Administrative & Personnel
 15 Committee may appoint and convene a subcommittee of the County Board for purposes of executing the strategic
 16 plan. This subcommittee shall meet a minimum of 2 times per calendar year with at least one public comment session
 17 in alternating locations throughout the county.
 18
 19 BE IT FUTHER RESOLVED that the above referenced subcommittee, in conjunction with the Administrative &
 20 Personnel Committee, shall report to the full Monroe County Board of Supervisors on at least an annual basis
 21 regarding the strategic plan.
 22
 23 BE IT FURTHER RESOLVED that each standing County Board Committee related to a pillar of the strategic plan
 24 shall place on the committee agenda an item to review the strategic plan and the goals of the related pillar at least 1
 25 time per year.

Dated this 30rd day of August, 2023.

Offered by the Administration/Personnel Committee.

Fiscal note: None

Statement of purpose: To approve the method for implementation and monitoring of the Monroe County Strategic plan.

Finance Vote (If required): ___ Yes ___ No ___ Absent	Committee of Jurisdiction Forwarded on: <u>August 8</u> , 2023 ___ 4 Yes ___ 0 No ___ 1 Absent
Approved as to form on <u>8/11/2023</u>  Lisa Aldinger Hamblin, Corporation Counsel	Committee Chair:   
<input type="checkbox"/> ADOPTED <input type="checkbox"/> FAILED <input type="checkbox"/> AMENDED <input type="checkbox"/> OTHER _____ County Board Vote on: _____ 20____ ___ Yes ___ No ___ Absent	STATE OF WISCONSIN COUNTY OF MONROE I, SHELLEY R. BOHL, Monroe County Clerk, DO HEREBY CERTIFY that the foregoing is a true and correct copy of Resolution # _____ acted on by the Monroe County Board of Supervisors at the meeting held on _____ SHELLEY R. BOHL, MONROE COUNTY CLERK <i>A raised seal certifies an official document.</i>

RESOLUTION TO AFFIRM AND ADOPT THE RECOMMENDATION TO MOVE FORWARD WITH A CONSOLIDATED MONROE COUNTY GOVERNMENT BUILDING AT THE ADMINISTRATIVE CENTER BLOCK SITE IN THE CITY OF SPARTA

1 **WHEREAS**, there was a special meeting of the Monroe County Board of Supervisors on June 22, 2023; and
 2
 3 **WHEREAS**, the Property & Maintenance Chair made a recommendation, on behalf of the committee, to
 4 consolidate county offices/buildings and to demolish the buildings at the former Rolling Hills facility; and
 5
 6 **WHEREAS**, the committee also recommended exploring the costs of the consolidation of certain county offices
 7 into a new building either at the old Rolling Hills site, the dog pound site, or the Administrative Center block in
 8 downtown Sparta; and
 9
 10 **WHEREAS**, the Monroe County Board of Supervisors discussed options as a committee of the whole; and
 11
 12 **WHEREAS**, a recommendation was made and supported by all supervisors present for consolidation of certain
 13 county offices into a new building located at the Administrative Center block in downtown Sparta by proceeding to
 14 explore costs of this option.
 15
 16 **NOW THEREFORE BE IT RESOLVED** by the Monroe County Board of Supervisors that they do hereby affirm and
 17 adopt the recommendation to move forward with a consolidated government building located at the current
 18 Administrative Center block site in the City of Sparta.
 19
 20 **BE IT FURTHER RESOLVED** that all necessary steps to move the project forward, including cost exploration, be
 21 pursued in a timely manner.

Dated this 30th day of August, 2023.

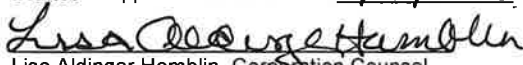
OFFERED BY THE PROPERTY & MAINTENANCE COMMITTEE.


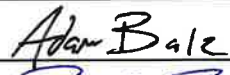
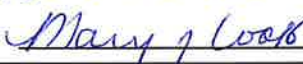

Fiscal note: There is no fiscal impact regarding this resolution.

Statement of purpose: To affirm the recommendation to move forward with a consolidated government building located at the Administrative Center block site.

Finance Vote (If required): ___ Yes ___ No ___ Absent
--

Committee of Jurisdiction Forwarded on: <u>August 23</u> , 20 <u>21</u> ___ 5 Yes ___ 0 No ___ 0 Absent
--

Drafted & Approved as to form on <u>8/21/2023</u>  Lisa Aldinger Hamblin, Corporation Counsel
--

Committee Chair: 
 
 

<input type="checkbox"/> ADOPTED <input type="checkbox"/> FAILED <input type="checkbox"/> AMENDED
<input type="checkbox"/> OTHER _____
County Board Vote on: _____ 20____
___ Yes ___ No ___ Absent

STATE OF WISCONSIN COUNTY OF MONROE I, SHELLEY R. BOHL, Monroe County Clerk, DO HEREBY CERTIFY that the foregoing is a true and correct copy of Resolution # _____ acted on by the Monroe County Board of Supervisors at the meeting held on _____
_____ SHELLEY R. BOHL, MONROE COUNTY CLERK A raised seal certifies an official document.

MONROE COUNTY CONSOLIDATED BUILDING ESTIMATE

DOWNTOWN SPARTA LOCATION

Building Option 1 w/Parking - Property & Maintenance Committee Recommendation

- One level of below-grade parking below the building foot print
- Remaining lot at-grade parking
- Estimated 40 below-grade and 67 at-grade parking spaces

\$339 per GSF

107 Parking Spaces

ITEM DESCRIPTION	SQ FOOT	TOTAL COST
BUILDING SITE	66,744	1,287,475
BELOW-GRADE PARKING - UNDER OFFICE BUILDING	20,000	2,461,746
OFFICE BUILDING - 4 STORY	80,000	29,871,965
ALT AD: SECOND ELEVATOR		320,747
TOTAL ESTIMATED CONSTRUCTION PLUS CONTINGENCY	100,000	33,941,933

Assumptions

- Budget estimate utilizing Q3 2023 anticipated pricing
- This option is not phased, GC will take over entire site
- Builders Risk - by owner
- General Contractor bond cost not included
- Demo of all buildings on building site block

Calculations above do not include

- SAC/WAC or other City impact fees not included
- Off-site improvements and/or public roadway work
- Special structural testing and inspection fees
- Hazardous materials abatement or testing of contaminated soils
- Unsuitable soils and contaminated soils
- Generators or back-up power (UPS)
- Furniture, Fixtures, Equipment, & Technology
- Building signage or branding

Structure

- BG Parking is assumed CIP concrete foundations/precast columns-beams/precast hollow core deck panels
- Office structure is assumed structural steel-metal decking/concrete topping slabs

Exterior Envelope

- Office exterior is assumed CFMF studs with exterior gypsum sheathing & mineral wool insulation
- Office facades include (curtain wall, storefront, precast sills, metal panel accents, cast stone veneer)
- Excludes any fiberglass attachment systems (green girt, knightwall, cascade clips)

Roofing

- Assumes a 60 mil tapered insulation roofing system with a total of R38

Projects Not Included Above to be Considered

- Demo and paving at 124 N Court St location

MONROE COUNTY CONSOLIDATED BUILDING ESTIMATE

DOWNTOWN SPARTA LOCATION

Building Option 2 w/Parking

- Entire block is below grade parking \$274 per GSF
- Remaining lot at-grade parking
- Estimated 146 below-grade and 86 at-grade parking spaces 232 Parking Spaces

ITEM DESCRIPTION	SQ FOOT	TOTAL COST
BUILDING SITE	66,744	1,708,976
BELOW GROUND PARKING - W/STAIR TOWER	65,920	8,087,048
OFFICE BUILDING - 4 STORY	60,000	29,871,955
ALT AD: SECOND ELEVATOR		320,740
TOTAL ESTIMATED CONSTRUCTION PLUS CONTINGENCY	125,920	39,988,719

Assumptions

- Budget estimate utilizing Q3 2023 anticipated pricing
- This option is not phased, GC will take over entire site
- Builders Risk - by owner
- General Contractor bond cost not included
- Demo of all buildings on building site block

Calculations above do not include

- SAC/WAC or other City impact fees not included
- Off-site improvements and/or public roadway work
- Special structural testing and inspection fees
- Hazardous materials abatement or testing of contaminated soils
- Unsuitable soils and contaminated soils
- Generators or back-up power (UPS)
- Furniture, Fixtures, Equipment, & Technology
- Building signage or branding

Structure

- BG Parking is assumed CIP concrete foundations/precast columns-beams/precast hollow core deck panels
- Office structure is assumed structural steel-metal decking/concrete topping slabs

Exterior Envelope

- Office exterior is assumed CFMF studs with exterior gypsum sheathing & mineral wool insulation
- Office facades include (curtain wall, storefront, precast sills, metal panel accents, cast stone veneer)
- Excludes any fiberglass attachment systems (green girt, knightwall, cascade clips)

Roofing

- Assumes a 60 mil tapered insulation roofing system with a total of R38

Projects Not Included Above to be Considered

- Demo and paving at 124 N Court St location

MONROE COUNTY CONSOLIDATED BUILDING ESTIMATE

DOWNTOWN SPARTA LOCATION

Building Option 3 w/Parking

- Traditional building footings \$319 per GSF
- Remaining lot at-grade parking - two story parking ramp
- Estimated 135 parking ramp and 35 surface parking spaces 170 Parking Spaces

ITEM DESCRIPTION	SQ FOOT	TOTAL COST
BUILDING SITE	66,744	1,123,152
PARKING RAMP 2-STORY	60,800	6,606,532
OFFICE BUILDING - 4 STORY	60,000	30,521,134
ALT AD: SECOND ELEVATOR		256,628
TOTAL ESTIMATED CONSTRUCTION PLUS CONTINGENCY	120,800	38,507,446

Assumptions

- Budget estimate utilizing Q3 2023 anticipated pricing
- This option is not phased, GC will take over entire site
- Builders Risk - by owner
- General Contractor bond cost not included
- Demo of all buildings on building site block

Calculations above do not include

- SAC/WAC or other City impact fees not included
- Off-site improvements and/or public roadway work
- Special structural testing and inspection fees
- Hazardous materials abatement or testing of contaminated soils
- Unsuitable soils and contaminated soils
- Generators or back-up power (UPS)
- Furniture, Fixtures, Equipment, & Technology
- Building signage or branding

Structure

- Office structure is assumed structural steel-metal decking/concrete topping slabs

Exterior Envelope

- Office exterior is assumed CFMF studs with exterior gypsum sheathing & mineral wool insulation
- Office facades include (curtain wall, storefront, precast sills, metal panel accents, cast stone veneer)
- Excludes any fiberglass attachment systems (green girt, knightwall, cascade clips)

Roofing

- Assumes a 60 mil tapered insulation roofing system with a total of R38

Projects Not Included Above to be Considered

- Demo and paving at 124 N Court St location

MONROE COUNTY CONSOLIDATED BUILDING ESTIMATE

DOWNTOWN SPARTA LOCATION

Building Option 4 w/Parking

- Traditional building footings \$552 per GSF
- Remaining lot at-grade parking & City Hall remaining lot at-grade parking
- Estimated 175 parking spaces 175 Parking Spaces

ITEM DESCRIPTION	SQ FOOT	TOTAL COST
BUILDING SITE	113,200	2,355,685
-SURFACE LOT PARKING - REMAINING ADMIN & CITY HALL LOTS		
OFFICE BUILDING - 4 STORY	60,000	30,521,134
ALT AD: SECOND ELEVATOR		256,592
TOTAL ESTIMATED CONSTRUCTION PLUS CONTINGENCY	60,000	33,133,411

-Does not include cost of purchase and demo of 5 structures on city hall block

Assumptions

- Budget estimate utilizing Q3 2023 anticipated pricing
- This option is not phased, GC will take over entire site
- Builders Risk - by owner
- General Contractor bond cost not included
- Demo of all buildings on building site block

Calculations above do not include

- SAC/WAC or other City impact fees not included
- Off-site improvements and/or public roadway work
- Special structural testing and inspection fees
- Hazardous materials abatement or testing of contaminated soils
- Unsuitable soils and contaminated soils
- Generators or back-up power (UPS)
- Furniture, Fixtures, Equipment, & Technology
- Building signage or branding

Structure

- Office structure is assumed structural steel-metal decking/concrete topping slabs

Exterior Envelope

- Office exterior is assumed CFMF studs with exterior gypsum sheathing & mineral wool insulation
- Office facades include (curtain wall, storefront, precast sills, metal panel accents, cast stone veneer)
- Excludes any fiberglass attachment systems (green girt, knightwall, cascade clips)

Roofing

- Assumes a 60 mil tapered insulation roofing system with a total of R38

Projects Not Included Above to be Considered

- Demo and paving at 124 N Court St location

TREASURER'S REPORT
For the period of July 1, 2023 to July 31, 2023
Debbie Carney, County Treasurer

RECEIPTS & DISBURSEMENTS	
Receipts for Current Month:	\$ 17,212,969.16
Wires & Disbursements for Current Month:	\$ 15,379,672.14

INVESTMENTS - GENERAL FUND				
Bank	ACCOUNT NUMBER	BALANCE	DUE DATES	INTEREST RATE
State Bank		\$ 11,259,455.96	none	5.29%
State Investment Pool		\$ 6,244,818.26	none	5.15%
Bank First Checking		\$ 504.03	none	0.00%
Bank First MM		\$ 250,884.50	none	4.66%
Citizens First Bank MM		\$ 5,526,714.41	none	
River Bank MM		\$ 8,836,591.66	none	4.13%
TOTAL GENERAL FUND INVESTMENTS		\$ 32,118,968.82		

GENERAL FUND BALANCES	
Month End Balance	
Outstanding Checks	\$ (688,225.00)
Outstanding Deposits	\$ 812,878.97
General Fund Investments	\$ 32,118,968.82
Totals	\$ 32,243,622.79

TOTAL GENERAL FUND AS OF JULY 2022	\$ 34,729,258.10
General fund is down from a year ago:	\$ (2,485,635.31)

DELINQUENT TAXES	
Delinquent Taxes in June 2023 were:	\$ 757,288.18
Delinquent Taxes in June 2022 were:	\$ 663,058.00
Delinquent Taxes are up from one year ago:	\$ 94,230.18

SALES & USE TAX	
Sales tax received June 2023	
Sales tax is for the months of Nov 2022 thru May 2023	\$ 2,731,992.21
Sales tax received June 2022	
Sales tax is for the months of Nov 2021 thru May 2022	\$ 2,555,352.26
SALES TAX IS UP FROM ONE YEAR AGO:	\$ 176,639.95

TREASURER'S REPORT
For the period of June 1, 2023 to June 30, 2023
Debbie Carney, County Treasurer

RECEIPTS & DISBURSEMENTS	
Receipts for Current Month:	\$ 7,684,870.87
Wires & Disbursements for Current Month:	\$ 8,951,706.92

INVESTMENTS - GENERAL FUND				
Bank	ACCOUNT NUMBER	BALANCE	DUE DATES	INTEREST RATE
State Bank		\$ 3,110,223.56	none	5.00%
State Investment Pool		\$ 6,217,611.56	none	5.09%
Bank First Checking		\$ 504.03	none	0.00%
Bank First MM		\$ 249,915.17	none	4.52%
Citizens First Bank MM		\$ 5,515,786.10	none	
River Bank MM		\$ 8,806,300.40	none	4.13%
TOTAL GENERAL FUND INVESTMENTS		\$ 23,900,340.82		

GENERAL FUND BALANCES	
Month End Balance	\$ (616,773.98)
Outstanding Checks	\$ (1,172,554.88)
Outstanding Deposits	\$ 80,685.81
General Fund Investments	\$ 23,900,340.82
Totals	\$ 22,191,697.77

TOTAL GENERAL FUND AS OF JUNE 2022	\$ 27,247,179.31
General fund is down from a year ago:	\$ (5,055,481.54)

DELINQUENT TAXES	
Delinquent Taxes in June 2023 were:	\$ 785,030.16
Delinquent Taxes in June 2022 were:	\$ 686,167.88
Delinquent Taxes are up from one year ago:	\$ 98,862.28

SALES & USE TAX	
Sales tax received June 2023	\$ 2,347,584.30
Sales tax is for the months of Nov 2022 thru Apr 2023	
Sales tax received June 2022	\$ 2,163,235.65
Sales tax is for the months of Nov 2021 thru Apr 2022	
SALES TAX IS UP FROM ONE YEAR AGO:	\$ 184,348.65

TREASURER'S REPORT
For the period of July 1, 2023 to July 31, 2023
Debbie Carney, County Treasurer

INVESTMENTS				
BANK	ACCOUNT NUMBER	BALANCE	DUE DATES	INTEREST RATE
History Room				
State Bank-History Room MMI		\$ 81,397.13	None	5.29%
State Bank-History Room MMII		\$ 13,644.81	None	5.29%
Monroe Co Local History Room Endowment #3 Fidelity Investments		\$ 2,030,639.54	None	
State Bank-Wegner Grotto Trust		\$ 253,926.37	None	5.29%
Wegner Grotto Endowment-Raymond James		\$ 422,185.30	None	
Haney Fund				
State Bank of Sparta MM		\$ 1,028.38	None	5.29%
Transportation - ADRC				
State Bank-ADRC Transportation		\$ 53,306.27	None	5.29%
Jail Assessment				
Bank First MM		\$ 286,151.39	None	4.66%
Monroe County Land Information Board				
Bank First MM		\$ 99,734.45	None	4.66%
Solid Waste Management				
State Bank - Ridgeview II-Closure Escrow		\$ 213,943.08	7/25/2024	4.25830%
		\$ 217,971.81	11/30/2023	3.72978%
		\$ 228,662.15	11/30/2023	3.72978%
		\$ 215,846.85	11/30/2023	3.72978%
		\$ 213,486.81	11/30/2023	3.72978%
		\$ 255,625.11	6/20/2024	4.16241%
		\$ 826,681.02	8/3/2023	3.82606%
		\$ 266,711.00	6/27/2024	4.16241%
State Bank - Facility Reserve-MM		\$ 3,551.53	None	5.29%
Section 125 Plan				
State Bank of Sparta		\$ 34,533.65	None	5.29%
Worker's Comp				
State Bank of Sparta		\$ 2,296,150.99	None	5.29%
Self Funded - Employee Insurance				
State Bank of Sparta		\$ 785,428.50	None	5.29%
American Rescue Plan				
State Bank of Sparta		\$ 3,272,922.84	None	5.29%
Highway Bonds				
River Bank MM		\$ 5,046,330.17	None	4.13%
Opioid Funds				
River Bank MM		\$ 330,600.85	None	4.13%
TOTAL OF RESTRICTED FUNDS-NOT IN GENERAL FUND:		\$ 17,119,859.15		

TREASURER'S REPORT
For the period of June 1, 2023 to June 30, 2023
Debbie Carney, County Treasurer

INVESTMENTS				
BANK	ACCOUNT NUMBER	BALANCE	DUE DATES	INTEREST RATE
History Room				
State Bank-History Room MMI		\$ 82,016.50	None	5.21%
State Bank-History Room MMII		\$ 13,583.78	None	5.21%
Monroe Co Local History Room Endowment #3 Fidelity Investments		\$ 1,990,511.48	None	
State Bank-Wegner Grotto Trust		\$ 254,500.77	None	5.21%
Wegner Grotto Endowment-Raymond James		\$ 409,027.62	None	
Haney Fund				
State Bank of Sparta MM		\$ 1,023.78	None	5.21%
Transportation - ADRC				
State Bank-ADRC Transportation		\$ 53,067.84	None	5.21%
Jail Assessment				
Bank First MM		\$ 288,016.97	None	4.52%
Monroe County Land Information Board				
Bank First MM		\$ 94,391.59	None	4.53%
Solid Waste Management				
State Bank - Ridgeview II-Closure Escrow		\$ 213,243.71	7/27/2023	3.77796%
		\$ 217,282.45	11/30/2023	3.72978%
		\$ 227,938.98	11/30/2023	3.72978%
		\$ 215,164.21	11/30/2023	3.72978%
		\$ 212,811.64	11/30/2023	3.72978%
		\$ 254,723.07	6/20/2024	4.16241%
		\$ 823,999.18	8/3/2023	3.82606%
		\$ 266,711.00	6/27/2024	4.16241%
State Bank - Facility Reserve-MM		\$ 3,535.64	None	5.21%
Section 125 Plan				
State Bank of Sparta		\$ 33,026.60	None	5.21%
Worker's Comp				
State Bank of Sparta		\$ 2,302,056.70	None	5.21%
Self Funded - Employee Insurance				
State Bank of Sparta		\$ 632,528.99	None	5.21%
American Rescue Plan				
State Bank of Sparta		\$ 3,958,147.93	None	5.21%
Highway Bonds				
River Bank MM		\$ 5,029,031.68	None	4.13%
Opioid Funds				
River Bank MM		\$ 317,174.24	None	4.13%
TOTAL OF RESTRICTED FUNDS-NOT IN GENERAL FUND:		\$ 17,576,342.11		

2023 MONTHLY GENERAL INFORMATION

MONTH	GENERAL FUND	SALES TAX	DELINQUENT TAXES
January	\$ 27,266,157.04	\$ 355,008.26 Sales Tax for Nov. 2022	\$ 958,148.96 *
February	\$ 26,745,781.52	\$ 503,856.13 Sales for Tax Dec. 2022	\$ 940,526.64 *
March	\$ 25,961,795.68	\$ 328,012.80 Sales for Tax Jan. 2023	\$ 885,826.83 *
April	\$ 25,636,061.54	\$ 326,541.72 Sales Tax for Feb. 2023	\$ 845,203.66 *
May	\$ 24,219,687.27	\$ 400,645.33 Sales Tax for Mar. 2023	\$ 809,824.00 *
June	\$ 22,191,697.77	\$ 433,520.06 Sales Tax for April 2023	\$ 785,030.16 *
July	\$ 34,729,258.10	\$ 384,407.91 Sales Tax for May 2023	\$ 757,288.18 *
August		Sales Tax for June 2023	NOW INCLUDES ALL YEARS DELINQUENT TAXES
September		Sales Tax for July 2023	
October		Sales Tax for Aug. 2023	
November		Sales Tax for Sept. 2023	
December		Sales Tax for Oct. 2023	

\$ 2,731,992.21 ← Sales Tax Received in 2023

*THESE DELINQUENT TAX AMOUNTS DO NOT INCLUDE THE TAX YEAR 2022

2022 MONTHLY GENERAL INFORMATION

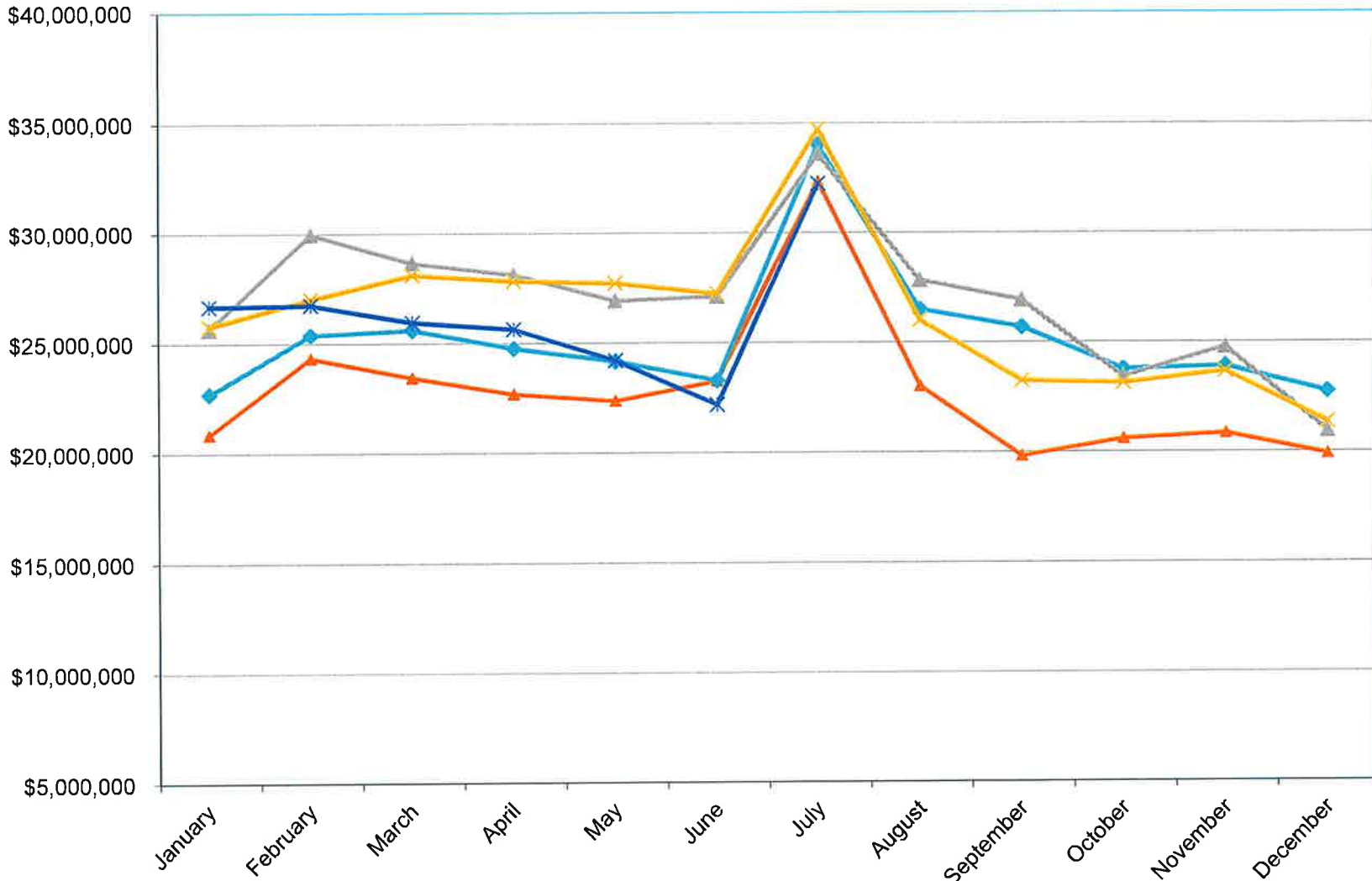
MONTH	GENERAL FUND	SALES TAX	DELINQUENT TAXES
January	\$ 25,792,909.82	\$ 326,204.52 Sales Tax for Nov. 2021	\$ 856,763.80 *
February	\$ 27,019,204.85	\$ 420,814.34 Sales for Tax Dec. 2021	\$ 841,523.50 *
March	\$ 28,110,984.03	\$ 289,326.42 Sales for Tax Jan. 2022	\$ 795,327.02 *
April	\$ 27,823,058.91	\$ 353,693.14 Sales Tax for Feb. 2022	\$ 769,442.30 *
May	\$ 27,730,766.13	\$ 331,738.81 Sales Tax for Mar. 2022	\$ 725,094.55 *
June	\$ 27,247,179.31	\$ 441,458.42 Sales Tax for April 2022	\$ 686,167.88 *
July	\$ 34,729,258.10	\$ 392,116.61 Sales Tax for May 2022	\$ 663,058.00 *
August	\$ 26,003,510.31	\$ 432,566.69 Sales Tax for June 2022	\$ 1,615,881.19
September	\$ 23,267,960.04	\$ 429,806.34 Sales Tax for July 2022	\$ 1,335,157.91
October	\$ 23,141,098.36	\$ 444,645.03 Sales Tax for Aug. 2022	\$ 1,195,438.03
November	\$ 23,676,066.42	\$ 455,697.66 Sales Tax for Sept. 2022	\$ 1,107,824.37
December	\$ 21,368,233.83	\$ 460,092.05 Sales Tax for Oct. 2022	\$ 987,485.38

NOW INCLUDES
ALL YEARS
DELINQUENT
TAXES

\$ 4,778,160.03 ← Sales Tax Received in 2022

Balance includes outstanding deposits, outstanding checks, checking acct balance, and General MM

County Total General Fund Cash Balance



2019 2020 2021 2022 2023

8/10/2023

Diane Erickson

Monroe County Finance Director

\\MCIS-PROFSV-DC\Data\Financial\Data\Finance Report\2023\2023 General Fund Reserved-Committed-20%

MONROE COUNTY MINIMUM FUND BALANCE POLICY

July 2023

Fund Balance in Excess of General and Special Revenue Fund Cash Reserves

General and Special Fund Balance MM/ICS -	\$	32,243,622.79
General Fund CD's	\$	-
Total General Fund	\$	32,243,622.79

General and Special Revenue Fund Cash Balance 7/31/2023 **\$ 20,239,170.65**

General Fund Restricted Total	\$	637,562.02
General Fund Committed Total	\$	218,724.56
General Fund Assigned Total	\$	1,671,145.04

General Fund Restricted, Committed and Assigned FundsTotal: **\$ 2,527,431.62**

General Fund cash balance less Restricted, Committed and Assigned Funds: **\$ 17,711,739.03**

Proprietary, Debt & Internal Service Funds Cash: **\$ 12,004,452.14**

Proprietary, Debt & Internal Service Funds Committed: **\$ 2,170,972.76**

Proprietary, Debt & Internal Service Funds Cash Less Committed: **\$ 9,833,479.38**

Actual 2023 total General & Special revenue budgeted operating expenses **\$ 41,453,681.00**

Minimum Fund Balance % **(X) 20%**

Minimum Fund Balance Amount **\$ 8,290,736.20**

General Fund Cash Balance Over/(Under) Minimum Fund Balance Amount **\$ 9,421,002.83**

8/10/2023

Diane Erickson Monroe County Finance Director

General Fund Balances

	2020		2021		
January	\$	22,711,767	\$	25,647,464	\$ 2,935,697
February	\$	25,386,603	\$	29,967,952	\$ 4,581,349
March	\$	25,609,602	\$	28,652,526	\$ 3,042,925
April	\$	24,778,942	\$	28,113,123	\$ 3,334,181
May	\$	24,183,414	\$	26,914,902	\$ 2,731,488
June	\$	23,314,454	\$	27,102,154	\$ 3,787,700
July	\$	34,031,682	\$	33,597,902	\$ (433,779)
August	\$	26,500,992	\$	27,826,159	\$ 1,325,167
September	\$	25,685,674	\$	26,918,527	\$ 1,232,853
October	\$	23,782,519	\$	23,420,672	\$ (361,846)
November	\$	23,908,747	\$	24,788,823	\$ 880,076
December	\$	22,768,894	\$	20,963,521	\$ (1,805,372)
	2021		2022		
January	\$	25,647,464	\$	25,792,910	\$ 145,446
February	\$	29,967,952	\$	27,019,205	\$ (2,948,747)
March	\$	28,652,526	\$	28,110,984	\$ (541,542)
April	\$	28,113,123	\$	27,823,059	\$ (290,065)
May	\$	26,914,902	\$	27,730,766	\$ 815,864
June	\$	27,102,154	\$	27,247,179	\$ 145,025
July	\$	33,597,902	\$	34,729,258	\$ 1,131,356
August	\$	27,826,159	\$	26,003,510	\$ (1,822,649)
September	\$	26,918,527	\$	23,267,960	\$ (3,650,567)
October	\$	23,420,672	\$	23,141,098	\$ (279,574)
November	\$	24,788,823	\$	23,676,066	\$ (1,112,757)
December	\$	20,963,521	\$	21,369,234	\$ 405,713
	2022		2023		
January	\$	25,792,910	\$	26,683,614	\$ 890,704
February	\$	27,019,205	\$	26,748,782	\$ (270,423)
March	\$	28,110,984	\$	25,961,796	\$ (2,149,188)
April	\$	27,823,059	\$	25,636,062	\$ (2,186,997)
May	\$	27,730,766	\$	24,219,687	\$ (3,511,079)
June	\$	27,247,179	\$	22,191,698	\$ (5,055,482)
July	\$	34,729,258	\$	32,243,623	\$ (2,485,635)
August	\$	26,003,510	\$	-	
September	\$	23,267,960	\$	-	
October	\$	23,141,098	\$	-	
November	\$	23,676,066	\$	-	
December	\$	21,369,234	\$	-	

These numbers include the Outstanding checks, deposits, and check account balance at month-end.

8/10/2023

Diane Erickson Monroe County Finance Director

\\MCIS-PROFSV-DC\Data\Financial\Data\Finance Report\2023\2023 General Fund Reserved-Committed-20%

Restricted, Committed and Assigned Funds

Restricted Funds

MM Haney Res 10000000 342100 E2050-\$1,000	\$	916.65	
Child Support - Designated Fund Balance	\$	22,816.88	
Software/computers 21300000 342100 E2200			
Redaction Fees 11715000 461390/521350	\$	14,211.55	
K-9 Donations 12116000 485000/579200	\$	18,156.13	
Dog Control 14195000 485000/579200	\$	70,509.86	
Justice Dept Donations 1295000 485000/579200	\$	339.00	
Veterans Service 14700000 485000/579200	\$	1,744.50	
Park Donations 15200000 485000/579200	\$	6,711.80	
Human Services Donations 24900500 485000/579200	\$	822.08	
Crep Program 16140000	\$	19,974.81	
Broadband Restricted Funds 16702100 485000/579100	\$	14,187.10	
Econ Dev & Tourism Funds for Project Grant 16700000 5791	\$	11,455.65	(ITBEC)
Forestry Maint. Land Acq. 16919000 580100	\$	36,057.35	
Forestry-Habelman Reforest 16919000 521700	\$	1,471.13	
Wildlife Habitat 16913000 435800/534050	\$	698.08	
Land Cons. CCTF Donations 16942200 485000/579200	\$	384.94	
Land Cons. Awards Banquet Don. 16940000 485000/579200	\$	2,953.86	
Non-lapsing Cons. Programs Account 16942000 435800/534005	\$	88,694.55	
Non-lapsing MDV(Multi-Discharge Variance) 16942100	\$	35,456.10	
Non-lapsing Land Dev.&MGMT Account 16948000 435800/534005	\$	290,000.00	

Committed Funds

Agronomist Position 16940000 579100 LC860	\$	25,573.09	
Nonlapsing Capital Parks 17620620 582500	\$	173,847.91	Res 08-21-03, Capital Bldgs Exp Budget
<u>Extension</u>			
Health & Well Being Exp. 15620613 579100	\$	8,864.02	
Youth Development Agent 15620615 579100	\$	10,439.54	

Assigned Funds

Human Services Reserve Fund 24900000 343000	\$	300,000.00
Contingency Fund Balance 10010000 539200	\$	70,578.00
Retirement/Fringe Pool 11435000 515200	\$	91,065.41
Nonlapsing Capital Pool 17100169	\$	624,559.00
Nonlapsing Capital Vehicle Pool 17100169 581100	\$	584,942.63

General Fund Total

\$ 2,527,431.62

Proprietary & Internal Service Funds

Debt Service Fund - Resolution 06-13-02	\$	1,534,623.31
Nonlapsing Technology Pool 71490000 599000	\$	636,349.45

Proprietary, Debt & Internal Service Funds

\$ 2,170,972.76

Former Treasurer to work 80 hours	1,714.00
Maintenance Truck Bid Overage	1,884.00
SW-Professional fees at Sand Creek site	20,000.00
Finance - GASB 87	1,950.00
SW-Filter systems on 6 homes	5,397.00
Dispatch - late 2022 invoice	16,392.00
Zoning-Board of Adjustment	10,000.00
Expenses from 2023 Contingency Fund:	<u><u>\$ 57,337.00</u></u>

8/4/2023

Diane Erickson Monroe County Finance Director

FINANCIAL DATA THROUGH JULY 31, 2023

Account Type

Account Type	Revenue			2023		
	2022 Total Annual Budget	2022 Month Actual	2022 Actual to Annual Budget %	2023 Total Annual Budget	2023 Month Actual	2023 Actual to Annual Budget %
100 - GENERAL FUND						
0000 - UNDEFINED	8,784	0	0.00%	9,425	0	100.00%
1000 - GENERAL GOVERNMENT	26,393,781	18,330,362	69.45%	24,718,490	11,206,036	45.33%
1110 - COUNTY BOARD	0	0		0	0	0.00%
1121 - CIRCUIT COURT	264,157	97,633	36.96%	248,225	94,701	38.15%
1122 - CLERK OF COURT	577,250	301,517	52.23%	569,210	305,285	53.63%
1124 - FAMILY COURT COMMISSIONER	5,180	2,580	49.81%	5,020	2,480	49.40%
1127 - MEDICAL EXAMINER	43,300	25,084	57.93%	44,905	31,892	71.02%
1131 - DISTRICT ATTORNEY	78,711	37,097	47.13%	79,171	29,299	37.01%
1132 - CORPORATION COUNSEL	0	0	100.00%	0	0	100.00%
1141 - ADMINISTRATOR	0	0	100.00%	0	0	100.00%
1142 - COUNTY CLERK	23,310	16,457	70.60%	23,005	22,746	98.87%
1143 - PERSONNEL	0	0	100.00%	0	0	100.00%
1151 - FINANCE DEPARTMENT	729,697	330,034	45.23%	796,643	398,371	50.01%
1152 - TREASURER	13,000	1,336	10.27%	12,000	3,568	29.74%
1160 - MAINTENANCE	1	0	0.00%	1	1	100.00%
1171 - REGISTER OF DEEDS	411,814	226,564	55.02%	384,647	177,543	46.16%
1172 - SURVEYOR	2,300	930	40.43%	1,890	690	36.51%
1175 - LAND RECORDS	227,031	110,268	48.57%	178,127	131,074	73.58%
1210 - SHERIFF DEPARTMENT	126,600	71,710	56.64%	165,103	161,279	97.68%
1270 - JAIL	132,933	63,730	47.94%	99,305	88,916	89.54%
1290 - EMERGENCY MANAGEMENT	82,938	13,221	-15.94%	82,938	875	-1.06%
1293 - DISPATCH CENTER	0	0	100.00%	41,640	0	100.00%
1295 - JUSTICE DEPARTMENT	457,045	114,081	24.96%	457,273	136,352	29.82%
1368 - SANITATION	139,500	51,503	36.92%	139,500	55,820	40.01%
1419 - DOG CONTROL	157,622	124,221	78.81%	164,414	147,859	89.93%
1470 - VETERANS SERVICE	12,650	12,650	100.00%	30,278	30,278	100.00%
1512 - LOCAL HISTORY ROOM	84,128	17,908	21.29%	84,970	16,902	19.89%
1520 - PARKS	213,970	137,228	64.13%	231,130	142,527	61.67%
1530 - SNOWMOBILE	238,915	231,467	96.88%	481,300	257,177	53.43%
1560 - UW-EXTENSION	22,206	14,928	67.22%	3,567	4,218	118.24%
1614 - CONSERV RESERVE ENHANCE PROGR	0	0	100.00%	0	0	100.00%
1670 - ECON DEV COMMERCE & TOURISM	11,956	11,956	100.00%	0	0	100.00%
1691 - FORESTRY	476,403	141,849	29.78%	172,100	96,001	55.78%
1694 - LAND CONSERVATION	540,980	125,148	23.13%	551,863	46,340	8.40%
1698 - ZONING	30,600	21,660	70.78%	39,824	30,696	77.08%
1700 - CAPITAL OUTLAY	113,155	52,500	46.40%	169,800	24,401	14.37%
100 - GENERAL FUND Total	31,619,916	20,659,177	65.34%	29,985,764	13,641,577	45.49%
213 - CHILD SUPPORT	653,435	337,314	51.62%	680,380	343,403	50.47%
241 - HEALTH DEPARTMENT	1,412,416	758,743	53.72%	1,488,990	736,558	49.47%
249 - HUMAN SERVICES	17,103,337	8,844,776	51.71%	16,262,415	9,597,202	59.01%
310 - DEBT SERVICE	7,012,646	49,357	0.70%	4,007,994	3,844,769	95.93%
410 - CAPITAL PROJECTS	0	0	100.00%	0	0	100.00%
633 - SOLID WASTE	2,828,294	1,179,059	41.69%	3,577,280	1,050,734	29.37%
642 - ROLLING HILLS	21,791,456	6,630,152	30.43%	10,000,467	4,588,616	45.88%
714 - INFORMATION SYSTEMS	1,314,689	1,254,915	95.45%	1,418,723	1,407,463	99.21%
715 - INFORMATION TECHNOLOGY POOL	630,401	63,174	10.02%	697,726	81,658	11.70%
717 - SELF FUNDED EMPLOYEE INSURANCE	6,117,349	3,813,058	62.33%	6,146,038	4,215,343	68.59%
719 - WORKERS COMPENSATION	333,820	105,862	31.71%	345,320	164,573	47.66%
732 - HIGHWAY	20,181,831	12,853,944	63.69%	20,857,740	8,576,594	41.12%
820 - JAIL ASSESSMENT	140,000	43,389	30.99%	80,000	45,962	57.45%
830 - LOCAL HISTORY ROOM	84,128	107,598	-127.90%	84,970	237,950	280.04%
856 - M.M. HANEY TRUST	0	3	100.00%	0	1	100.00%
Grand Total	111,223,719	56,485,324	50.79%	95,633,808	48,532,405	50.75%

This is 7 out of 12 months
These Revenue numbers include the tax appropriations for 2023

58.33%

FINANCIAL DATA THROUGH JULY 31, 2023

Account Type	Expense			2023		
	2022 Total Annual Budget	2022 Month Actual	2022 Actual to Annual Budget %	2023 Total Annual Budget	2023 Month Actual	2023 Actual to Annual Budget %
100 - GENERAL FUND						
0000 - UNDEFINED	2,943,749	2,437,852	82.81%	1,560,020	1,873,852	100.00%
1000 - GENERAL GOVERNMENT	3,687,957	0	0.00%	2,097,886	0	0.00%
1110 - COUNTY BOARD	119,729	60,074	50.18%	123,555	69,732	56.44%
1121 - CIRCUIT COURT	678,997	324,047	47.72%	677,470	329,345	48.61%
1122 - CLERK OF COURT	838,209	352,174	42.02%	881,629	424,624	48.16%
1124 - FAMILY COURT COMMISSIONER	40,800	20,400	50.00%	40,800	20,400	50.00%
1127 - MEDICAL EXAMINER	245,951	91,529	37.21%	278,815	134,811	48.35%
1131 - DISTRICT ATTORNEY	729,014	384,662	52.76%	758,760	390,642	51.48%
1132 - CORPORATION COUNSEL	310,600	133,908	43.11%	339,538	168,256	49.55%
1141 - ADMINISTRATOR	246,205	120,300	48.86%	243,325	133,905	55.03%
1142 - COUNTY CLERK	349,631	153,834	44.00%	301,473	192,942	64.00%
1143 - PERSONNEL	448,182	201,675	45.00%	398,209	171,672	43.11%
1151 - FINANCE DEPARTMENT	1,174,119	583,402	49.69%	1,284,721	671,100	52.24%
1152 - TREASURER	331,375	150,418	45.39%	363,076	196,888	54.23%
1160 - MAINTENANCE	1,008,280	480,348	47.64%	1,183,826	608,895	51.43%
1171 - REGISTER OF DEEDS	144,166	144,390	100.00%	317,601	138,879	43.73%
1172 - SURVEYOR	27,556	18,155	65.88%	27,781	20,360	73.29%
1175 - LAND RECORDS	229,953	88,069	38.30%	182,851	83,110	45.45%
1190 - CNTY INS./MRRPC/SMRT/FARM ED	524,767	646,386	123.18%	566,630	673,093	118.79%
1210 - SHERIFF DEPARTMENT	3,522,140	1,769,744	50.25%	3,548,117	1,941,377	54.72%
1270 - JAIL	3,188,447	1,570,045	49.24%	3,292,820	1,682,228	51.09%
1290 - EMERGENCY MANAGEMENT	175,113	90,972	51.95%	152,816	82,936	54.27%
1293 - DISPATCH CENTER	1,297,050	680,813	52.49%	1,404,496	741,123	52.77%
1295 - JUSTICE DEPARTMENT	1,122,058	483,946	43.13%	1,213,022	613,367	50.57%
1368 - SANITATION	204,321	82,224	40.24%	263,120	98,415	37.40%
1419 - DOG CONTROL	267,483	97,119	36.31%	292,909	114,509	39.09%
1470 - VETERANS SERVICE	205,633	84,145	40.92%	234,098	119,062	50.86%
1511 - LIBRARY	388,328	388,328	100.00%	459,426	459,426	100.00%
1512 - LOCAL HISTORY ROOM	226,573	94,619	41.76%	246,708	111,057	45.02%
1520 - PARKS	148,852	60,730	40.80%	223,214	96,545	43.25%
1530 - SNOWMOBILE	238,915	0	0.00%	481,300	143,125	29.74%
1560 - UW-EXTENSION	232,598	113,031	48.60%	169,011	44,498	26.33%
1614 - CONSERV RESERVE ENHANCE PROGR	21,347	0	0.00%	21,420	1,446	100.00%
1670 - ECON DEV COMMERCE & TOURISM	1,810,183	72,835	4.02%	1,749,683	1,700,977	97.22%
1691 - FORESTRY	237,513	77,839	32.77%	183,422	87,529	47.72%
1694 - LAND CONSERVATION	1,347,753	438,553	32.54%	1,390,284	321,516	23.13%
1698 - ZONING	124,977	66,048	52.85%	166,600	78,607	47.18%
1700 - CAPITAL OUTLAY	2,601,392	528,279	20.31%	2,865,333	1,139,158	39.76%
100 - GENERAL FUND Total	31,619,916	13,090,891	41.40%	29,985,764	15,879,408	52.96%
213 - CHILD SUPPORT	653,435	376,181	57.57%	680,380	370,799	54.50%
241 - HEALTH DEPARTMENT	1,412,416	635,911	45.02%	1,488,990	660,979	44.39%
249 - HUMAN SERVICES	17,103,337	7,476,904	43.72%	16,262,415	8,694,620	53.46%
310 - DEBT SERVICE	7,012,646	6,861,814	97.85%	4,007,994	2,344,604	58.50%
410 - CAPITAL PROJECTS	0	0	100.00%	0	0	100.00%
633 - SOLID WASTE	2,828,294	1,298,901	45.93%	3,577,280	1,272,618	35.58%
642 - ROLLING HILLS	21,791,456	13,701,453	62.88%	10,000,467	5,135,460	51.35%
714 - INFORMATION SYSTEMS	1,314,689	771,669	58.70%	1,428,148	739,726	51.80%
715 - INFORMATION TECHNOLOGY POOL	630,401	6,253	0.99%	688,301	56,641	8.23%
717 - SELF FUNDED EMPLOYEE INSURANCE	6,117,349	2,911,393	47.59%	6,146,038	2,918,064	47.48%
719 - WORKERS COMPENSATION	333,820	202,692	60.72%	345,320	221,582	64.17%
732 - HIGHWAY	20,181,831	3,598,504	17.83%	20,857,740	5,064,652	24.28%
820 - JAIL ASSESSMENT	140,000	63,598	45.43%	80,000	47,387	59.23%
830 - LOCAL HISTORY ROOM	84,128	17,908	21.29%	84,970	15,190	17.88%
Grand Total	111,223,719	51,014,073	45.87%	95,633,808	43,421,729	45.40%

FINANCIAL DATA THROUGH JULY 31, 2023

Account Type	Salary & Fringe Expense					
	2022 Total Annual Budget	2022 Month Actual	2022 Actual to Annual Budget %	2023 Total Annual Budget	2023 Month Actual	2023 Actual to Annual Budget %
100 - GENERAL FUND						
1110 - COUNTY BOARD	76,220	35,408	46.46%	80,782	39,641	49.07%
1121 - CIRCUIT COURT	365,790	198,462	54.26%	394,328	219,913	55.77%
1122 - CLERK OF COURT	582,090	292,711	50.29%	637,543	337,334	52.91%
1127 - MEDICAL EXAMINER	159,541	71,259	44.67%	179,594	98,586	54.89%
1131 - DISTRICT ATTORNEY	701,863	366,984	52.29%	731,039	378,584	51.79%
1132 - CORPORATION COUNSEL	302,934	131,313	43.35%	328,440	163,719	49.85%
1141 - ADMINISTRATOR	237,335	115,937	48.85%	233,305	129,110	55.34%
1142 - COUNTY CLERK	206,652	111,528	53.97%	220,705	123,341	55.88%
1143 - PERSONNEL	223,278	119,682	53.60%	244,721	134,029	54.77%
1151 - FINANCE DEPARTMENT	1,122,086	542,704	48.37%	1,214,820	633,452	52.14%
1152 - TREASURER	265,564	138,331	52.09%	293,986	174,150	59.24%
1160 - MAINTENANCE	369,943	195,857	52.94%	393,207	222,911	56.69%
1171 - REGISTER OF DEEDS	249,238	123,150	49.41%	241,543	117,439	48.62%
1175 - LAND RECORDS	78,399	42,339	54.00%	83,665	46,300	55.34%
1210 - SHERIFF DEPARTMENT	2,989,345	1,546,045	51.72%	3,134,158	1,736,091	55.39%
1270 - JAIL	2,332,546	1,173,329	50.30%	2,423,907	1,250,424	51.59%
1290 - EMERGENCY MANAGEMENT	140,984	85,289	60.50%	120,091	78,340	65.23%
1293 - DISPATCH CENTER	1,071,159	527,503	49.25%	1,175,176	587,268	49.97%
1295 - JUSTICE DEPARTMENT	761,810	344,760	45.26%	808,595	442,955	54.78%
1368 - SANITATION	142,133	76,778	54.02%	197,071	92,078	46.72%
1419 - DOG CONTROL	155,231	74,977	48.30%	178,775	94,651	52.94%
1470 - VETERANS SERVICE	186,282	76,052	40.83%	192,200	106,168	55.24%
1512 - LOCAL HISTORY ROOM	141,883	73,790	52.01%	162,035	89,072	54.97%
1520 - PARKS	88,120	42,307	48.01%	166,782	81,287	48.74%
1560 - UW-EXTENSION	158,227	80,471	50.86%	118,921	38,758	32.59%
1691 - FORESTRY	60,557	33,008	54.51%	65,936	37,480	56.84%
1694 - LAND CONSERVATION	383,185	216,788	56.58%	477,516	234,164	49.04%
1698 - ZONING	115,443	61,687	53.43%	144,886	72,746	50.21%
100 - GENERAL FUND Total	13,667,839	6,898,448	50.47%	14,643,727	7,759,993	52.99%
213 - CHILD SUPPORT	539,508	293,837	54.46%	620,423	340,371	54.86%
241 - HEALTH DEPARTMENT	1,262,996	592,285	46.90%	1,284,564	615,389	47.91%
249 - HUMAN SERVICES	5,888,558	3,002,819	50.99%	6,876,647	3,635,320	52.86%
633 - SOLID WASTE	159,989	87,781	54.87%	166,273	93,168	56.03%
642 - ROLLING HILLS	6,265,306	2,940,156	46.93%	6,588,341	3,249,615	49.32%
714 - INFORMATION SYSTEMS	377,067	200,582	53.20%	384,684	214,138	55.67%
732 - HIGHWAY	3,925,622	2,019,025	51.43%	3,932,716	2,281,817	58.02%
Grand Total	32,086,885	16,034,932	49.97%	34,497,375	18,189,812	52.73%

This is 7 out of 12 months Insurance and 15/26 Payrolls

Monroe County Administrator's Report – August 2023

By: Tina Osterberg

- Maintenance
 - Worked with Kraus-Anderson to get estimated costs for a consolidated building in the downtown location
 - Derek and I have been looking at alternate options/locations for staff at the north complex and facilities downtown during potential construction downtown
 - Toured possible lease location for Zoning, Sanitation, Land Records, Forestry, Parks, and IT staff
- Adrian and I toured the new park shower building August 2nd. The shower building looks to be on schedule to be completed and operational for the August 30th groundbreaking/county board meeting
- Attended DNR farm tour with Bob Micheel 8/8 at Jack Herrick and Tucker Gretebeck farms – invite from Dan Baumann, Secretary's Director, West Central, WDNR.
- Toured Savanna Institute, Spring Green with CCTF members & Mississippi River Regional Planning Commission 8/22
- Presented 2023 budget information at a glance at the Town Association meeting 8/17
- The Health Department tested 6 Town of Angelo wells for PFAS 8/17 – we are awaiting results
- Rolling Hills
 - Bus garage design meetings continue with expected final design to Rolling Hills Committee 9/25 for review
- Broadband
 - Groundbreaking was Tuesday 8/15 at St Mary's Distillery, Cashton
- RFP's
 - Solid Waste Landfill professional engineering bid review and approval by Solid Waste Committee 8/16
 - Veteran Services office remodel bid review and approval by Property & Maintenance Committee 8/9
 - Asbestos and hazardous materials inspection/survey bid review and approval by Property & Maintenance Committee 8/9
 - North Complex RH, Building B, tunnel, boiler house.
 - Budget adjustment at 8/30 Board meeting for funding approval
 - Assembly room equipment RFP was posted on Friday 8/4 - September Administrative & Personnel Committee bid review for approval
 - Justice Center technology center project to start soon
- Received annual opioid settlement distributor payment on 8/2 - \$53,722.37
- Department 2024 budgets were due August 18th to the County Administrator
 - The budget team will be meeting with all departments 8/28 – 9/1
 - Net New Construction and Equalized Values have been released
 - Estimated allowable levy increase - \$217,358 - 1.19%, down from \$235,648 - 1.307%
 - Presented a potential modification to the 2024 budget books at Finance 8/16
- Adrian has been working with the departments to schedule the October 23rd and 24th budget meetings with the Finance Committee