



# City of Appleton

100 North Appleton Street  
Appleton, WI 54911-4799  
www.appleton.org

## Meeting Agenda - Final

### Human Resources & Information Technology Committee

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Wednesday, March 11, 2020

6:30 PM

Council Chambers, 6th Floor

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1. Call meeting to order
2. Roll call of membership
3. Approval of minutes from previous meeting

[20-0352](#) Minutes from 2-12-2020

**Attachments:** [Minutes 2-12-20.pdf](#)

#### 4. Public Hearings/Apearances

#### 5. Action Items

[20-0354](#) Request to award Heartland Business Solutions the contract to purchase and implement a new Audio Visual (AV) system for Fire and Police. The amount requested is \$89,628.50 with a 10.4% contingency for a total of \$100,000.

**Attachments:** [AFD - APD AV Memo.pdf](#)

[20-0355](#) Request to award Heartland Business Solutions the contract to purchase and implement a new Audio Visual (AV) system for Council Chambers. The amount requested is \$89,937.81 with a 10% contingency for a total of \$100,000.

**Attachments:** [Council Chambers AV Memo.pdf](#)

[20-0358](#) Request approval to over hire a Master Electrician in the Department of Public Works for approximately 30 days with an estimated fiscal impact of \$8,400.

**Attachments:** [DPW Overhire Master Electrician 3-11-20.pdf](#)

[20-0384](#) Request approval to over hire a Health Officer in the Health Department for approximately 30 days with an estimated fiscal impact of \$12,000.

**Attachments:** [Health Officer over hire.pdf](#)

## 6. Information Items

[20-0356](#) 2019 Pay for Performance data

**Attachments:** [2020 P4P data report.pdf](#)

[20-0357](#) Library Table of Organization change deleting 1-.5 Library Page Clerk, 1-.5 Library Clerk and 1-FTE Operations Clerk and adding 1-FTE Library Safety Supervisor and \$15,000 to Operations Part-Time sub budget.

**Attachments:** [Library TO Change information March 2020 memo.pdf](#)

[Library Safety Supervisor position.pdf](#)

[Library draft TO 2-15-20.pdf](#)

[Library June 2019 memo.pdf](#)

[Library January 2018 memo.pdf](#)

[20-0381](#) Connecting Care Clinic Quarter 4, 2019 Utilization results

**Attachments:** [Connecting Care Clinic Q4 2019.pdf](#)

[20-0353](#) Recruitment Status Report 3-5-2020

**Attachments:** [RSR thru 3-5-20.pdf](#)

## 7. Adjournment

*Notice is hereby given that a quorum of the Common Council may be present during this meeting, although no Council action will be taken.*

*Reasonable Accommodations for Persons with Disabilities will be made upon Request and if Feasible.*

*Questions on agenda contact Director Matz at 920-832-6426.*



# City of Appleton

100 North Appleton Street  
Appleton, WI 54911-4799  
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## Meeting Minutes Human Resources & Information Technology Committee

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Wednesday, February 12, 2020

6:30 PM

Council Chambers, 6th Floor

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1. Call meeting to order

2. Roll call of membership

**Present:** 4 - Van Zeeland, Thao, Siebers and Fenton

**Excused:** 1 - Spears

3. Approval of minutes from previous meeting

[20-0161](#)

Minutes from 1/29/20

**Attachments:** [Minutes 1-29-20.pdf](#)

**Siebers moved, seconded by Fenton, that the Minutes be approved. Roll Call.  
Motion carried by the following vote:**

**Aye:** 4 - Van Zeeland, Thao, Siebers and Fenton

**Absent:** 1 - Spears

4. **Public Hearings/Apearances**

5. **Action Items**

[20-0160](#)

Request to award Heartland Business Solutions the contract to purchase and implement a new network core switching system. The amount requested is \$52,178.68 with a 10% contingency for a project total of \$57,400.

**Attachments:** [Network Core Replacement.pdf](#)

**Siebers moved, seconded by Fenton, that the Report Action Item be recommended for approval. Roll Call. Motion carried by the following vote:**

**Aye:** 4 - Van Zeeland, Thao, Siebers and Fenton

**Absent:** 1 - Spears

[Res 020-17](#)

Resolution 1-R-20 City Administrator

**Attachments:** [Resolution #1-R-20 City Administrator.pdf](#)  
[HR-IT Coenen - Resolution #1-R-20 - Form of Government.pdf](#)  
[Resolution #1-R-20 memo.pdf](#)

**Siebers moved, seconded by Van Zeeland, that the Resolution Submitted by Alderperson be recommended for approval. Roll Call. Motion carried by the following vote:**

**Aye:** 4 - Van Zeeland, Thao, Siebers and Fenton

**Absent:** 1 - Spears

**6. Information Items**

[20-0162](#)

Recruitment Status Report 2/6/20

**Attachments:** [RSR thru 2-6-20.pdf](#)

**This item was presented**

**7. Adjournment**

**Siebers moved, seconded by Fenton, that the meeting adjourn be approved. Roll Call. Motion carried by the following vote:**

**Aye:** 4 - Van Zeeland, Thao, Siebers and Fenton

**Absent:** 1 - Spears



*"...meeting community needs...enhancing quality of life."*

Information Technology Department  
100 N. Appleton Street  
Appleton, WI 54911

## MEMO

To: Alderperson Siebers and Members of the HR / IT Committee  
From: Dean J. Fox, Information Technology Director  
Date: 3/4/2020

Re: Request to award Heartland Business Solutions the contract to purchase and implement a new Audio Visual (AV) system for Fire and Police. The amount requested is \$89,628.50 with a 10.4% contingency for a total of \$100,000.

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The CIP budget of \$100,000 includes funding to replace the AV gear at all 6 AFD Stations and add new AV gear to the training room at APD used for inter-station communications and training.

An RFP went out in late November for an AV system to replace the outdated equipment which has reached end of life and 8 years old and is out of maintenance.

We received 7 bids from 6 different vendors and the 2<sup>nd</sup> bid from Heartland was within budget and meets all our needs. All but 2 other bids were over the allotted budget.

I request your consideration and approval of a contract with Heartland Business Solutions as proposed. After considerable review, and multiple follow up questions, it has been determined due to the inclusive nature of the Heartland AV equipment solution, the cost included in the proposal, and the complete software package with it, that the Heartland response is the best solution for the next 7 years for the City of Appleton.

If you have any questions regarding this recommendation, please contact Dean Fox.



*"...meeting community needs...enhancing quality of life."*

Information Technology Department  
100 N. Appleton Street  
Appleton, WI 54911

## MEMO

To: Alderperson Siebers and Members of the HR / IT Committee  
From: Dean J. Fox, Information Technology Director  
Date: 3/4/2020

Re: Request to award Heartland Business Solutions the contract to purchase and implement a new Audio Visual (AV) system for Council Chambers. The amount requested is \$89,937.81 with a 10% contingency for a total of \$100,000.

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The CIP budget of \$100,000 includes funding to replace the AV gear including sound, cameras and a hearing loop in Council Chambers.

An RFP went out in late November for an AV system to replace the outdated equipment which has reached end of life and 18 years old.

We received 5 bids from 5 different vendors and the bid from Heartland was within budget and meets all our needs.

I request your consideration and approval of a contract with Heartland Business Solutions as proposed. After considerable review, and multiple follow up questions, it has been determined due to the inclusive nature of the Heartland AV equipment solution, the cost included in the proposal, and the complete software package with it, that the Heartland response is the best solution for the next 10 plus years for the City of Appleton.

If you have any questions regarding this recommendation, please contact Dean Fox.

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## MEMO

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**TO:** Human Resources Committee

**FROM:** Paula Vandehey, Director of Public Works *PAV*

**DATE:** March 4, 2020

**SUBJECT: Request to Over Hire – Public Works Master Electrician**

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The Department of Public Work's current Table of Organization includes one Lead Electrician and two Master Electricians. We recently filled one of the Master Electrician positions due to a retirement. Now, we have received notification that our Lead Electrician is planning to retire on June 5, 2020. Between these two retirements we will lose 64 years of City of Appleton experience!

The Master Electrician position is responsible for the installation, maintenance and repair of the City's traffic-related electrical equipment and facilities, which includes traffic signals, street lights, traffic communications grid, etc. This is a technically skilled position that requires the incumbent to have considerable knowledge of electrical systems, methods, electrical codes and regulations.

In order for us to have a successful transition of the duties of these two positions, I believe the City would greatly benefit from having the incumbents transfer their significant institutional knowledge over a 30 day over hire period of the Master Electrician position.

The financial impact for this proposal is approximately \$8,420. We anticipate utilizing vacant salary dollars to cover the cost of the requested over hire.

C: Sandy Matz, Human Resources Director  
Eric Lom, City Traffic Engineer



# MEMO

**TO:** Human Resources Committee  
**FROM:** Sandy Matz, Human Resources Director  
**DATE:** March 5, 2020  
**SUBJECT:** **Request to Over Hire – Health Officer**

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As you are aware, our Health Officer, Kurt Eggebrecht, will be retiring in June of this year. To allow for a smoother transition between Kurt and the newly hired Health Officer, we are requesting approval to over hire for this position. We anticipate the over hire to be between two weeks and thirty days. The fiscal impact for a thirty day over hire is approximately \$12,000. Some of the money would be covered by vacant salary dollars from other positions within the Health Department and any remaining amount would be covered by wage reserve.

Please let me know if you have any questions regarding the request.

## 2019 PAY FOR PERFORMANCE DATA

Department	2020 Adjust less than 2.00%	2020 Adjustment 2.0%-3.0%	2020 Adjustment 3.0-4.0%	2020 Adjustment 4.0-5.0%	2020 Adjustment 6.0-7.0%	Hired Late in Year, No Eval Score
Mayor	0	1	0	2	0	
Legal Services	0	0	1	7	0	1
Finance	0	4	4	6	0	
Comm Econ Dev	0	0	5	12	0	
Health	0	2	4	9	0	
I.T.	0	0	4	4	0	
Valley Transit	0	0	2	1	2	2
PRFM	1	1	16	10	0	2
Public Works	0	34	32	82	2	2
Police	0	1	27	17	0	
Fire	0	0	6	4	0	
Utilities	0	2	14	17	0	1
Library	0	5	28	21	0	
Human Resources	0	2	1	5	0	
Directors	0	1	2	9	0	
City Total	1	53	146	206	4	8

Lump Sum Adjustments given = 5

Lump Sum due to employee at top of pay grade = 39

Union	1/1/2020 Increase	7/1/2020 Increase
VT Teamster Contract	1.00%	1.00%
	<b>4/1/20 Increase</b>	<b>10/1/20 Increase</b>
APPA Union Contract	1.00%	1.25%
		<b>10/1/20 Increase</b>
Fire Union Contract		2.25%



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**APPLETON PUBLIC LIBRARY**  
225 North Oneida Street  
Appleton, WI 54911-4780  
(920) 832-6170 | FAX: (920) 832-6182

**TO: CITY OF APPLETON HUMAN RESOURCES & INFORMATION TECHNOLOGY COMMITTEE**

**FROM: COLLEEN RORTVEDT, DIRECTOR – APPLETON PUBLIC LIBRARY**

**DATE: MARCH 6, 2020**

**RE: INFORMATION ON THE LIBRARY TABLE OF ORGANIZATION CHANGE– Safety Supervisor**

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The Appleton Public Library Board of Trustees approved the attached table of organization change at their February 25 meeting.

Please note that at the recommendation of the City of Appleton’s compensation consultant, the title of the position will be called “Safety Supervisor” rather than Safety Manager as listed on the attached memo dated 2-12-2020. The Library Board will be informed of this update at their March meeting.

I am happy to answer any questions you have regarding this change.



**APPLETON PUBLIC LIBRARY**  
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(920) 832-6170 | FAX: (920) 832-6182

**TO: APPLETON PUBLIC LIBRARY BOARD OF TRUSTEES**  
**FROM: COLLEEN RORTVEDT, DIRECTOR – APPLETON PUBLIC LIBRARY**  
**DATE: FEBRUARY 12, 2020**  
**RE: LIBRARY TABLE OF ORGANIZATION CHANGE REQUEST – Safety Manager**

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All library staff are expected to deal with issues related to safety and security as part of their job. However, the primary safety and security responsibilities at the library are currently divided between multiple staff. This workload has grown in volume and complexity and is no longer sustainable. The need for continuous attention to procedures, ongoing training, maintaining relationships with neighborhood collaborations, oversight of the guards and the contract with the security company deserve the dedicated time and attention of an individual that can provide a cohesive, clear and appropriate approach to safety and security.

For to the above reasons, I am recommending the following additions to the table of organization totaling \$93,805

- Adding 1 FTE Library Safety Manager in an amount not to exceed \$51,376 plus benefits in Pay Grade “I” in Library Administration (16010.610100). Salary projection is based on the mid point of the pay grade.
- Adding \$15,000 to the existing Operations Part Time Sub budget (16031.6108000)

Due to recent retirements, I propose the following eliminations to fund the above changes totaling \$93,805

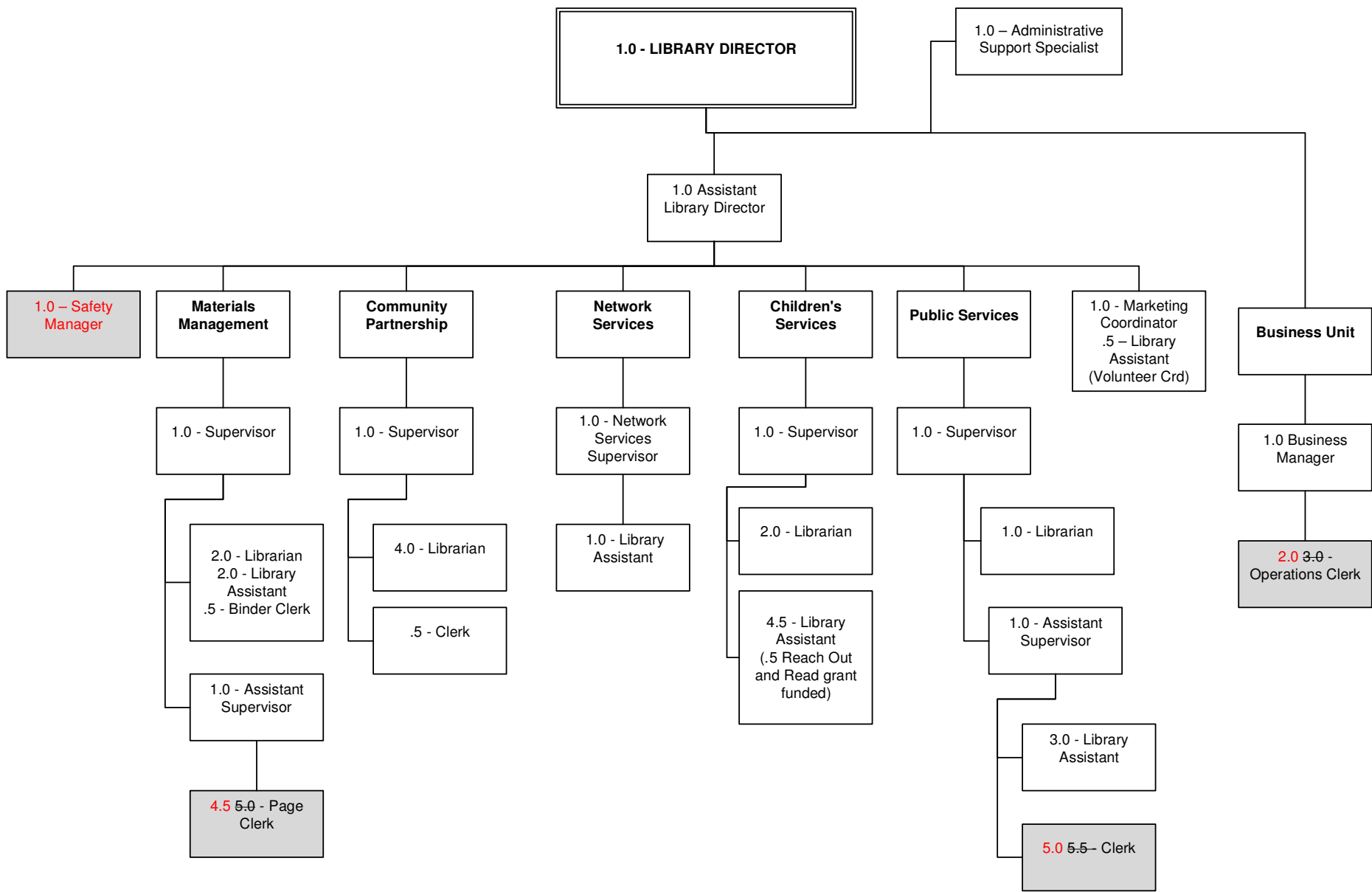
- vacant .5 FTE Library Clerk – Public Services (projected at \$16,562)
- vacant .5 FTE Library Page Clerk – Materials Management (projected at \$15, 619)
- vacant 1 FTE Operations Clerk – Operations (projected at \$61,624 / includes benefits)

The Library Safety Manager position will oversee the safety and security of staff, patrons and the library facility. They will be responsible for coordinating, planning, directing and training all library staff in issues related to safety and security. They will provide supervisory leadership to our contracted security staff to protect library patrons, staff, collections, moveable property and the facility. Part of their role will include maintaining relationships with law enforcement, library and security staff, as well as other city agencies.

Providing safety and security in an environment that prioritizes welcoming and inclusiveness is complicated and it is important that as we hire for this position, that we do it with the expectations that the library board has in accordance with our library’s strategic plan mission, vision, values and objectives. The Library Board President has referred additional discussion of how the library’s strategic plan guides safety and security at the library to occur at this meeting. This discussion will be helpful to us as we search for the ideal candidate and oversee their approach to this work.

Safety and security issues have evolved and become increasingly time consuming and more complicated. Staff are expected to respond to safety and security issues as they arise and over the years staff have risen to that expectation admirably. However, we needed to recognize that we hire staff with expertise in different library specialty areas and that this was an area where we needed to do the same. I request you approve these changes to the library's table of organization.

*Note: Since 2017 library staff have been providing updates regarding the status of safety and security at the library at library board meetings. Most of you are already familiar with this history so rather than repeat this information I have provided copies of the relevant memos in conjunction with this memo.*





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(920) 832-6170 | FAX: (920) 832-6182

TO: Appleton Public Library Board of Trustees  
FROM: Colleen Rortvedt, Library Director  
DATE: June 18, 2019  
SUBJECT: Library Safety and Security Update

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The Appleton Public Library Building and Equipment Committee met on May 29 to discuss library safety and security. At that meeting the committee asked me to provide an update at the board meeting as well as describe any necessary board action that would be taken. I currently have no recommendations for actions for the library board to take.

Discussions about safety and security at the library are not new and all public entities have an obligation to make safety and security a priority. While we are all grappling with the recent horrors and heroism that occurred in our neighborhood last month, our focus has been on the long-term safety and security needs of the library.

The library hasn't embarked on this work alone. We have had enormous support from our Facilities Department, Police Department and the Milwaukee Public Library (MPL) who serves as a Resource Library to the State of Wisconsin. MPL provided us their Security Manager to participate in our security assessment and procedure and training updates.

In brief:

- We have updated procedures, will be developing a mandatory staff training and offering opportunities for staff to become familiar with aspects of the building they may not use often.
- The security guard is covering all operating hours.
- A security assessment of the building was completed with APD, Facilities and the MPL Security Manager. Updates currently being evaluated and prioritized.
- An evaluation of the neighborhood was done last week and we anticipate additional changes including an added camera, signage, removing or trimming trees that have made it difficult to monitor the neighborhood and removal of small structures that tend to encourage loitering.
- Library staff are researching alternative service models including the possibility of an in house or contracted community resource specialist to focus on connecting people facing poverty or experiencing homelessness with critical services, making referrals, serving as a conduit to other community agencies
- Staff are receiving training on compassion resilience

I will continue to provide you with regular updates. If there is any information you would like please let me know.

For more details about the above please read below.

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## **Procedures and Training**

Proper procedures and enforcement of policy are possibly the most important things we can do to ensure a safe library. We have updated library policies over the years to be in line with national library standards and our local need will continue to do so.

In the past month we have reviewed and updated our active threat procedure with the help of APD's Threat Assessment Officer and the MPL Security Manger. This procedure will be incorporated into an updated mandatory annual training.

Since a key part of any emergency is staff familiarity with the facility, regular opportunities for staff to have tours of rarely accessed emergency exits, stairways and alternative routes will be provided. Our new staff orientation will be updated to address safety and security procedures as well.

## **Security Guards**

As you may recall, in January of 2018, the APL Board of Trustees approved a pilot to work with a contracted security company due to increased incidents within the library over the past several years. This funding provided a guard afternoons, nights and weekends. That pilot was successful in reducing calls for service to APD. Initially we also experienced a decrease in incidents within the library from 2017 but 2019 has returned to 2017 levels.

Importantly, while all staff are still expected to address issues they encounter, the guards allow staff to focus on their library work and allow an expert in security to address the behavior issues. Many of the issues the guards deal with are de-escalated by their interaction. The guards also take the lead on coordination with medical emergencies. While usually not security related, these issues are very time consuming and tend to disrupt the building, entrance and parking lot.

After it was determined that additional funding would not be available for security in 2019, staff identified a way to continue providing guards in 2019 for the same hours as in 2018 through reducing part time staff hours, the library's materials budget and a one-time savings in our network services contracts.

Following the tragedy outside the library in May, the library director directed the guards to be here during all library operating hours. This will require an additional \$10,000 and staff are still working to identify the source of the funding and will bring that forward in the future as a budget adjustment.

## **Security Assessment of Building**

The current library facility has had security related upgrades over the years including cameras, a door access system, modifications to create doors to staff areas where there were none and other smaller security modifications. However, staff has been careful to do the minimum updates due to the ambiguous status of the library building project.

Regardless of what happens with the mixed-use library project the Appleton Public Library will be in this current facility for several more years. Consequently, city Facilities and library staff are working diligently to prioritize necessary security upgrades and implement different safety and security tools. We will do this with an understanding that we still do not know the future of the library building but must balance the public and staff's safety. I will be able to update you more at future meetings.

## **Neighborhood**

The library neighborhood is a highly visited area with multiple public entities located adjacent to each other. Over recent years our neighbors have disappeared as multiple buildings adjacent to us have been



demolished. The potential for redevelopment in the neighborhood is exciting but in the meantime the library works hard to be good stewards of our neighborhood.

Library property ends at the sidewalk in front of the library. Library staff works closely with our fellow city departments of Valley Transit, Department of Public Works, Facilities Management and Appleton Police Department as well as private stakeholders and Appleton Downtown Inc to address safety needs outside the library's doors. This partnership resulted in the neighborhood's longstanding security guard collaboration.

An evaluation of the neighborhood was done last week and we anticipate additional changes including an added camera, signage, removing or trimming trees that have made it difficult to monitor the neighborhood and removal of small structures that tend to encourage loitering.

### **Alternative Service Models**

A public library serves as an essential component of the civic and educational foundation of a community. For some a library is a place to simply get books, attend programs or access the internet. For others it is a lifeline, serving as a place where people turn for help during life transitions and where people in need of resources come for assistance.

For many years the library has been involved in partnerships and initiatives to respond positively to the changing needs of our community and we continue to work in a proactive way to balance safety and security needs with progressive approaches to serving our entire community.

One way libraries are increasingly responding is by employing or contracting with an agency to provide a social worker or in-house community resources specialist that focuses on connecting people facing poverty or experiencing homelessness with critical services, making referrals, serving as a conduit to other community agencies in areas of physical and mental health, housing and providing training to library staff. This position coordinates with local agencies to increase their presence within the library as well, something APL has been doing with local agencies in recent years. Eau Claire recently became the first library in the state to employ a community resources specialist.

Locally we are evaluating what type of position might be appropriate and feasible based on local needs. The United Way Fox Cities recently hosted a meeting on our behalf with a variety of providers in these areas to discuss this issue and we are evaluating next steps and potential partners. We are still in preliminary discussions on this and any future recommendations will be brought back to the board.

Finally, supporting our staff in new ways will be essential. Library work has evolved over the years as our community's needs have evolved and we are a key piece of our community's social safety net. Earlier this year we began working with the Wisconsin Initiative for Stigma Elimination and Rogers Behavioral Health to be the first library in the state to focus on compassion resilience. This program trains in-house staff as facilitators and peer supporters to learn from their work in groups or one-on-one as staff understand compassion fatigue and develop wellness and resilience strategies.



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**TO:** Appleton Public Library Board of Trustees

**FROM:** Colleen Rortvedt, Library Director

**DATE:** January 9, 2018

**SUBJECT:** Request to approve budget adjustment and to single source safety and security services to Securitas for the balance of 2018 in an amount not to exceed \$47,000

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A public library serves as an essential part of the civic and educational foundation of a community. For some a library is a place to simply get books, attend programs or access the internet. For others it is a lifeline, serving as a place where people turn for help during life transitions and where individuals and families in need seek access to resources.

The Appleton Public Library (APL) continues to respond to our community's changing needs. The strategies we use embrace the evolving role of public libraries as part of the social safety net, serving people in need via a community-wide approach. Embracing this role, APL uses a multi-faceted approach to safety and security including:

- Keeping policies relevant. The Security and Safety Policy was updated in the fall of 2017.
- Exploring opportunities for utilizing and providing space for APD's behavioral health officer.
- Seeking alternative sources of funding to accomplish goals. APL and City staff attempted to secure Community Development Block Grant funds in 2017 to work through issues in the neighborhood but learned APL was ineligible for funding.
- Working proactively with populations that may not be familiar with library rules to familiarize them with library services and appropriate library behavior in a positive way.
- Offering regular programming and events connecting populations that are in need to area services.
- Exploring opportunities for agency street outreach staff to provide service in the library.
- Working to eliminate barriers to library access:
  - Expanding time limit for internet access to 3 hours a day
  - Eliminating fine restrictions on internet access
- Hosting "office hours" for social service agencies and non-profits serving in-need and at-risk populations.
- Holding training for staff by the Appleton Police Department (APD) and social service organizations on relevant issues of trauma, crisis, mental illness, homelessness, de-escalation, bomb threats and active threats.
- Working directly with homeless shelters on issues and communicating any emergency closures.
- Participating in local coalitions such as Housing Coalition meetings, Hmong Interagency meetings, Hispanic Interagency meeting, refugee resettlement and the Community Early Learning Center
- Collaborating on APD's Summer of Service.
- Participating in the Washington Square Neighborhood Group for over a decade, including contributing to the public-private partnership for the neighborhood security guard since 2012.

In 2010/2011, APL created the position of Operations Clerk in response to increased security incidents. This hybrid position looks after the overall library environment including; cleaning staff areas, setting up meeting rooms, supporting small facility projects, enforcing library policies, and serving as support for staff dealing with behavior issues that do not rise to the level of police intervention. This was an innovative approach and the Operations Clerks were very effective in mitigating the increases in behavior issues at that time.

Over the past two years, security incidents rising to the level of police intervention or leading to library restrictions have doubled. This adds stress on staff to complete their work, provide quality service for the public and to have a general sense of safety. The public is also concerned. In our biannual survey, safety is cited as the top concern from the public. The needs that we have today require a new level of expertise in safety and security.

In order to respond to these needs I am proposing:

A. APL contract with a company specializing in security to provide an unarmed security guard for the remainder of 2018 during the library's afternoon, evening and weekend hours for an average of 57 hours a week.

B. An internal budget adjustment from Materials Management – Books and Library Materials (16032.6315) to Administration – Other Contracts/Obligations (16010.6599) in the amount of \$47,000 in order to pilot this program with the approved funding for the 2018 budget. While we need to continue to have strong collections, safety and security are of paramount importance.

C. APL single-source this position to Securitas USA, providing the following advantages:

Securitas provides excellent service as the security guard provider for the Washington Square collaboration. They are familiar with the neighborhood and the security issues we face. They have a workstation within Valley Transit and monitor the interior of transit and the parking structures in the surrounding neighborhood.

While APL has unique statutory requirements in regards to privacy and confidentiality, integration between the proposed library security guard, the Washington Square security guard, Library Administration and the Appleton Police Department to the extent possible by law will be improved by utilizing the same provider.

In addition, Securitas has experience working within public libraries across the country and is committed to working with the unique needs of a public library environment. The library would move forward in a similar manner as done in the hiring of the Washington Square security guard and involve Appleton Police Department in the hiring process and training. APD and Securitas have worked well together through this partnership.

I request approval of this proposal as a pilot for 2018 that will be evaluated for continuation in future years. Evaluation will include impact on staff's perception of safety at work, number of incidents recorded during the year, and whether this position allows library staff to focus on their direct work rather than on security functions.

Thank you for your consideration of this important request.

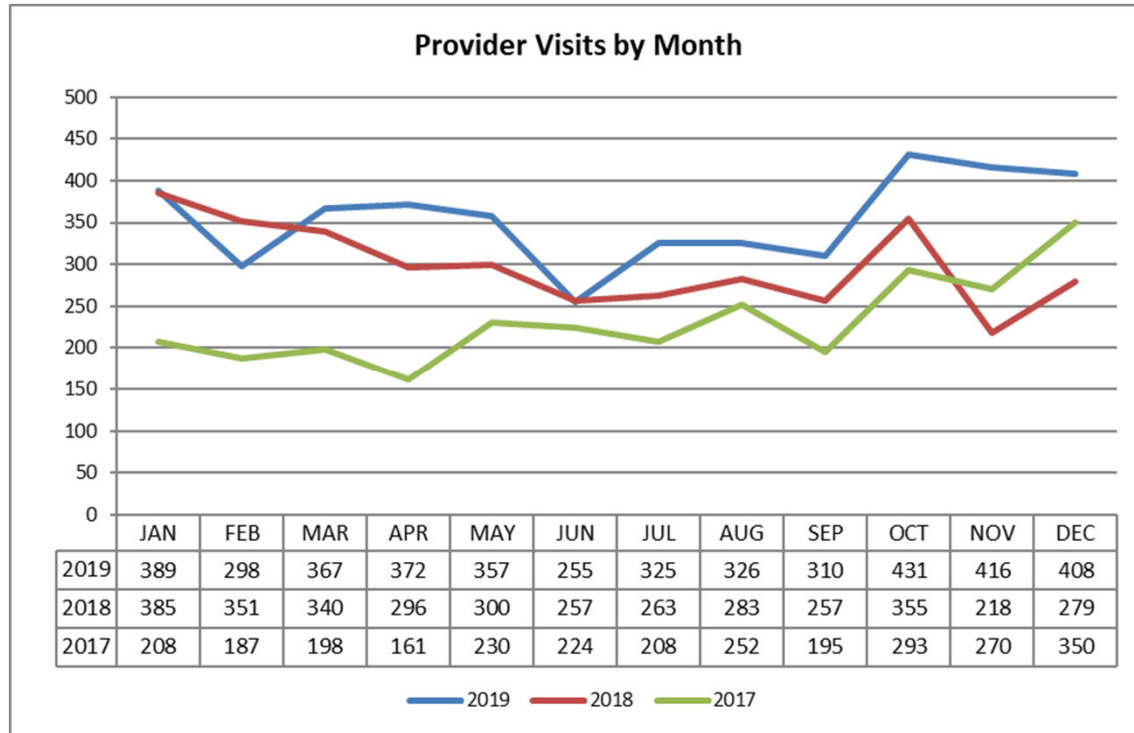


2019 Annual Update: Connecting  
Care Clinic Performance

# Agenda

- Utilization
- Quality
- Satisfaction
- ROI

# Provider Visits



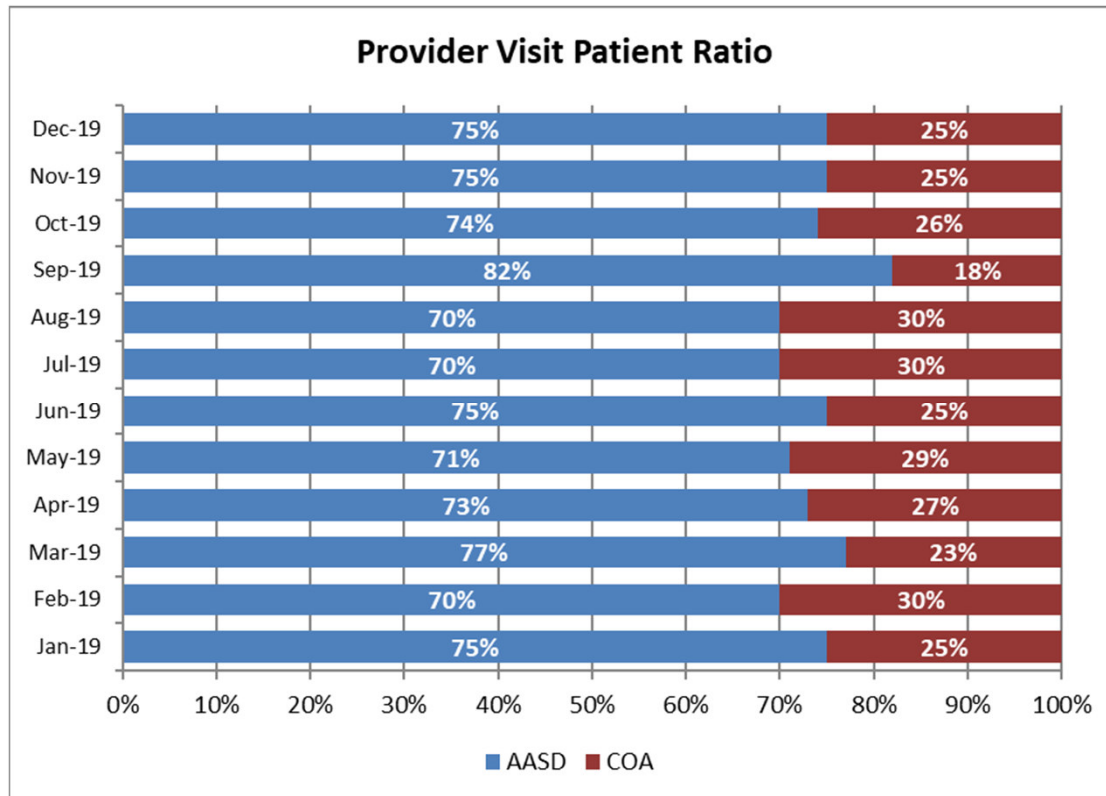
- 4QTR 2019 volume up 47% over 4QTR 2018
- YTD visit volume up 45% over 2018
- 4254 total Provider visits
- Referrals to Health Coach for lifestyle habits coaching.
- Acute visits lead to chronic condition discussion/management.

\*Added 2<sup>nd</sup> provider May 2017

Provider = NP/PA and MD



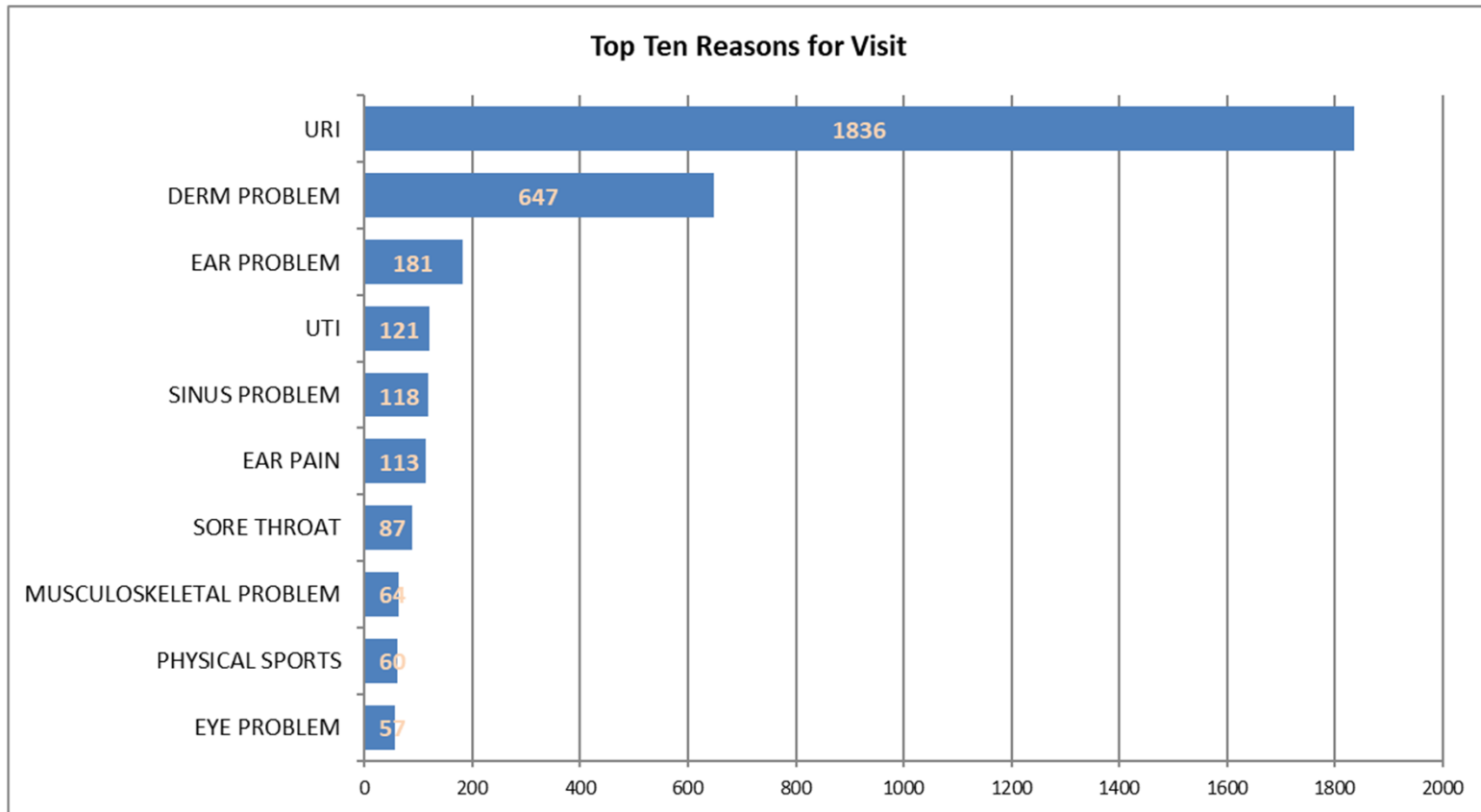
# Provider Visit Ratio – YTD



- Q4 ratio is relatively unchanged vs Q3 and 2018
- AASD 74% / COA 26% of provider visits overall in 2019.
- 4254 total Provider visits
  - 3147 AASD
  - 1106 COA

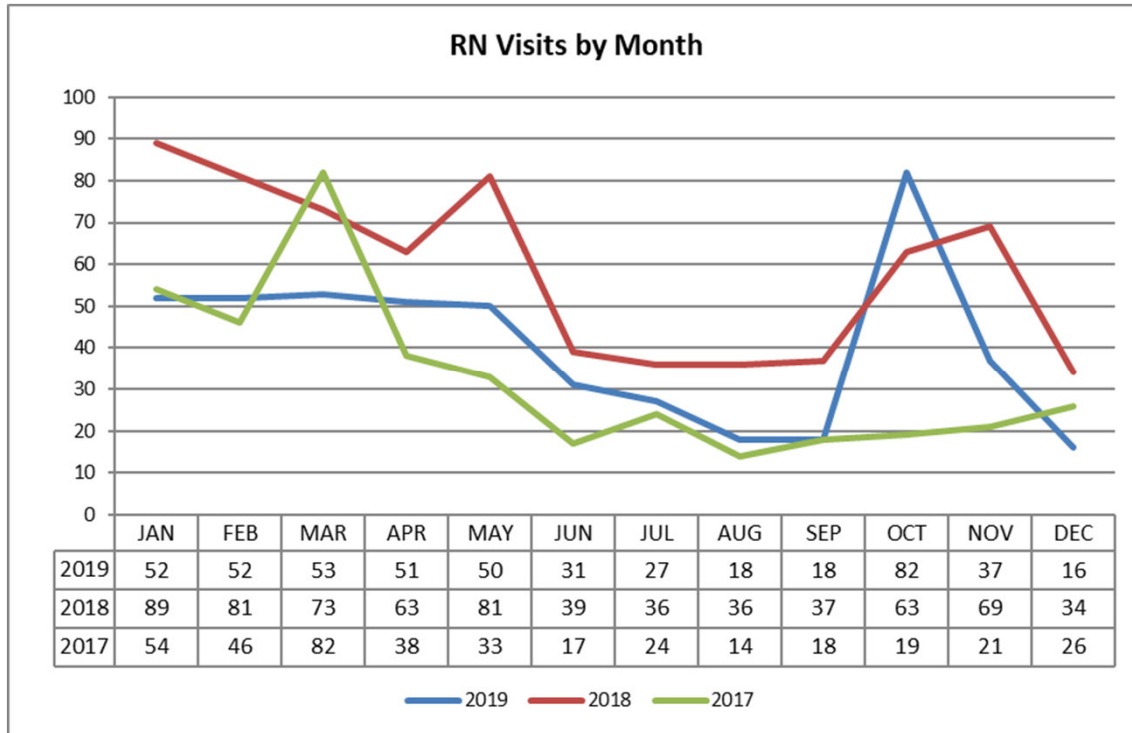
Provider = NP/PA and MD

# Provider Visits – Reason for Visit (YTD)



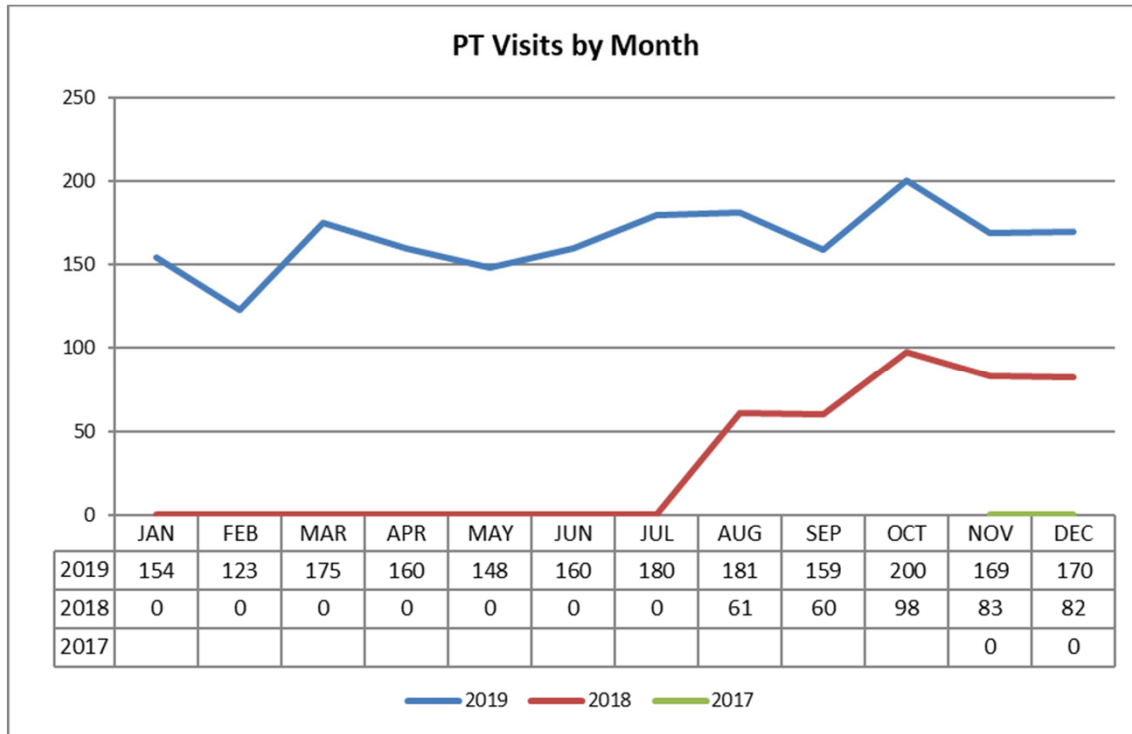


# RN Visits



- Urinary issues and Strep testing.
- Smoking Cessation
- PT2 (DPP) Class
- Backup for lab schedule – vaccinations and lab draws.
- Patient calls looking for advice.
- Work with patients on MyThedaCare sign-up and questions.
- Working with Health Coach to get her PT2 program up and running. (September – October)
- Ordering supplies to keep APCs appointments running smoothly.
- Coordination of care with staff PTO and sick leave.

# PT Visits



- Total PT Visits in 2019 = 1,979
  - AASD 1,280 (65%)
  - COA 699 (35%)
  - October visits of 200 is highest since start of program

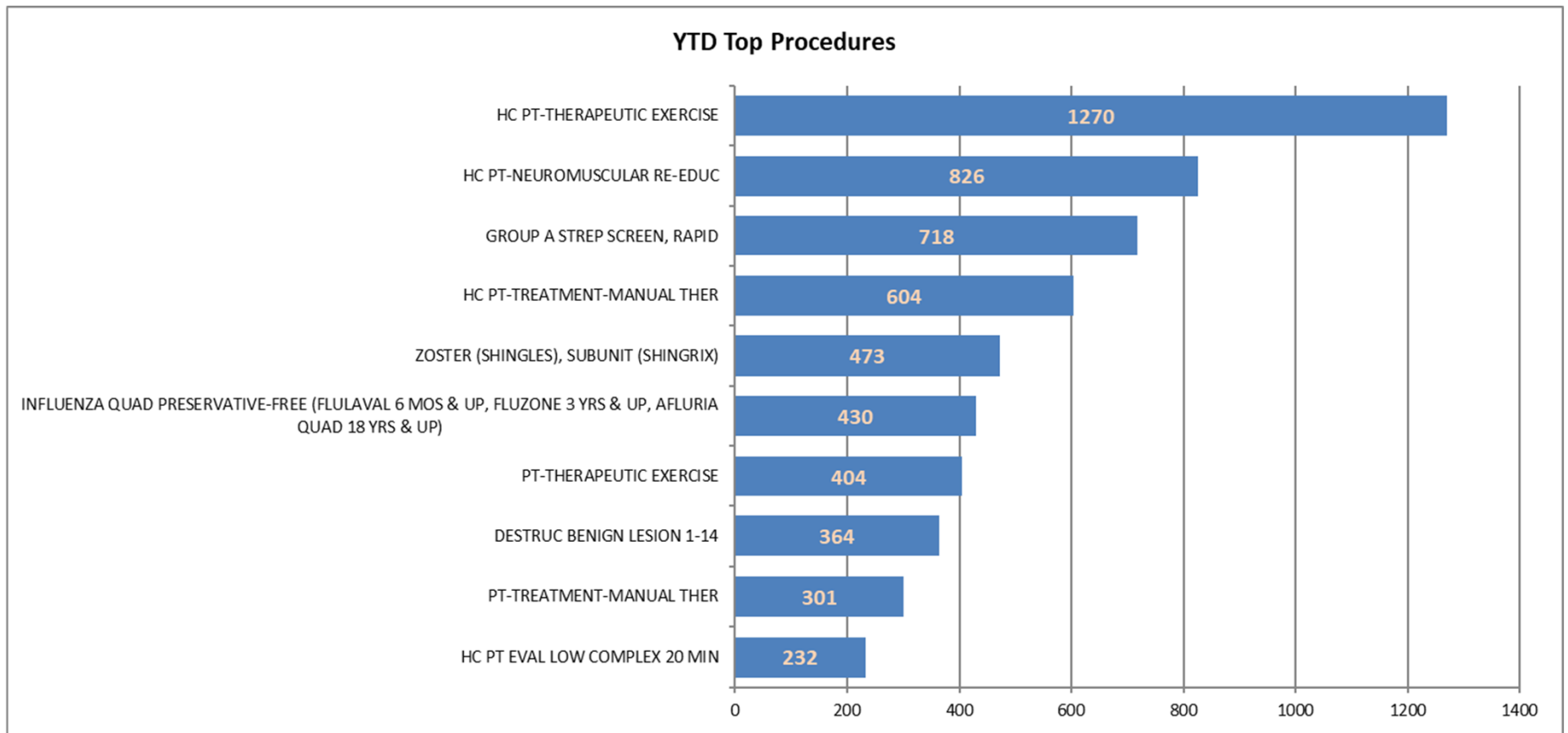
\*Increased PT to 40 hours per week 1/1/19

# 4th Qtr Utilization Analysis

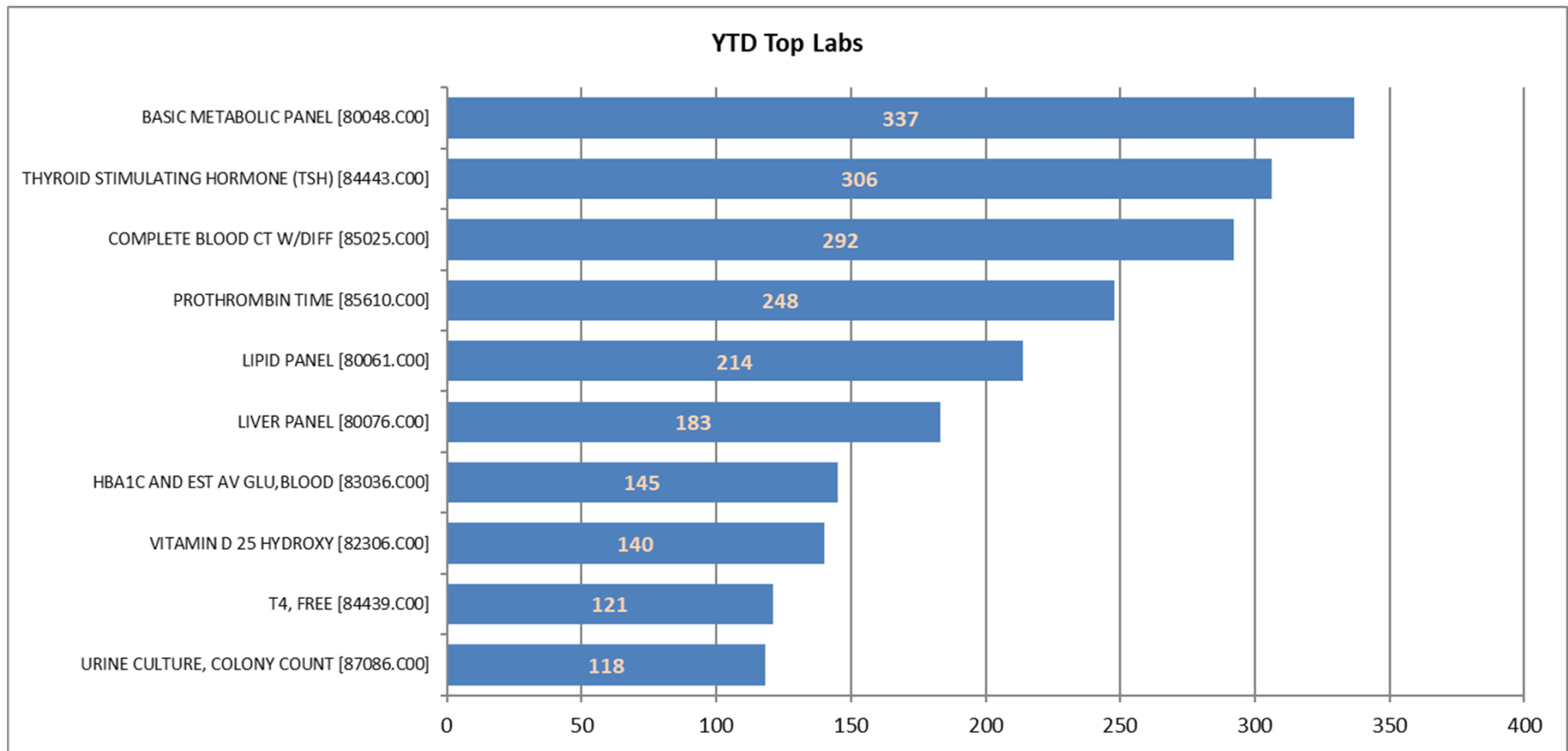
## Areas of Opportunity/Concerns/Successes

- Filled 82% of provider slots in 4th Quarter (up from 68% in 3<sup>rd</sup>)
  - Monday (90% filled) and Tuesday (92%) tend to have slightly better utilization than the other weekdays: Wednesday (75%), Thursday (75%), Friday (87%).
  - Demand relatively strong throughout the day. No significant patterns or preferences.
- Filled 83% of PT slots in the 4th Quarter
  - Very steady weekday utilization. Monday (87%), Tuesday (81%), Wednesday (82%), Thursday (81%), Friday (85%)
  - No-shows much more prevalent than what Zach and JP see at ThedaCare Ortho.
  - May want to start calling patients if no show occurs.

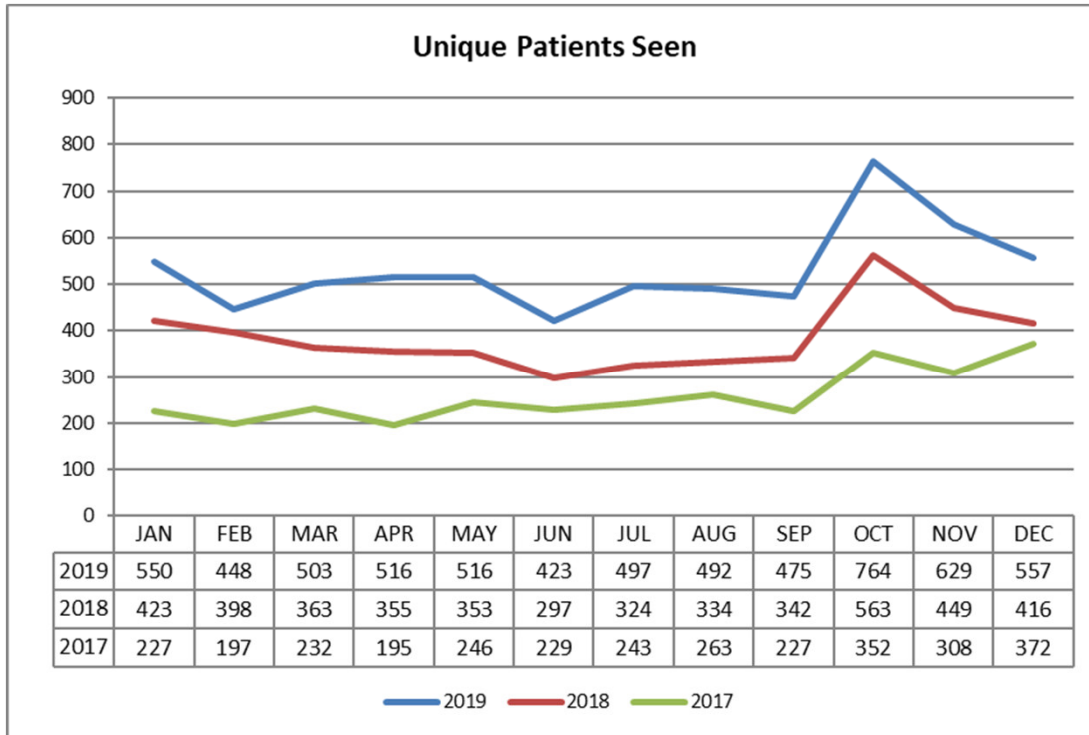
# Top Procedures (YTD)



# Top Labs (YTD)



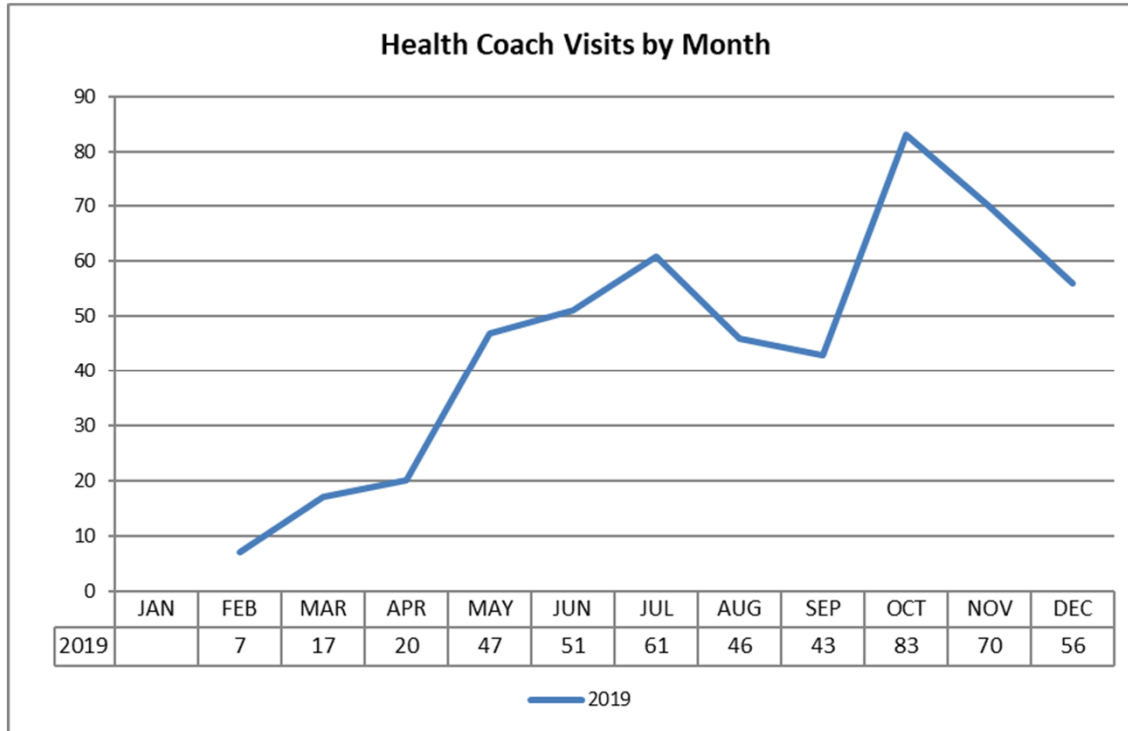
# Unique Patients Seen – All Visit Types



## Notes/Observations

- Total of 2,797 unique patients seen in 2019.
  - 2,106 AASD (75%)
  - 834 COA (25%)

# Total Health Coach Visits

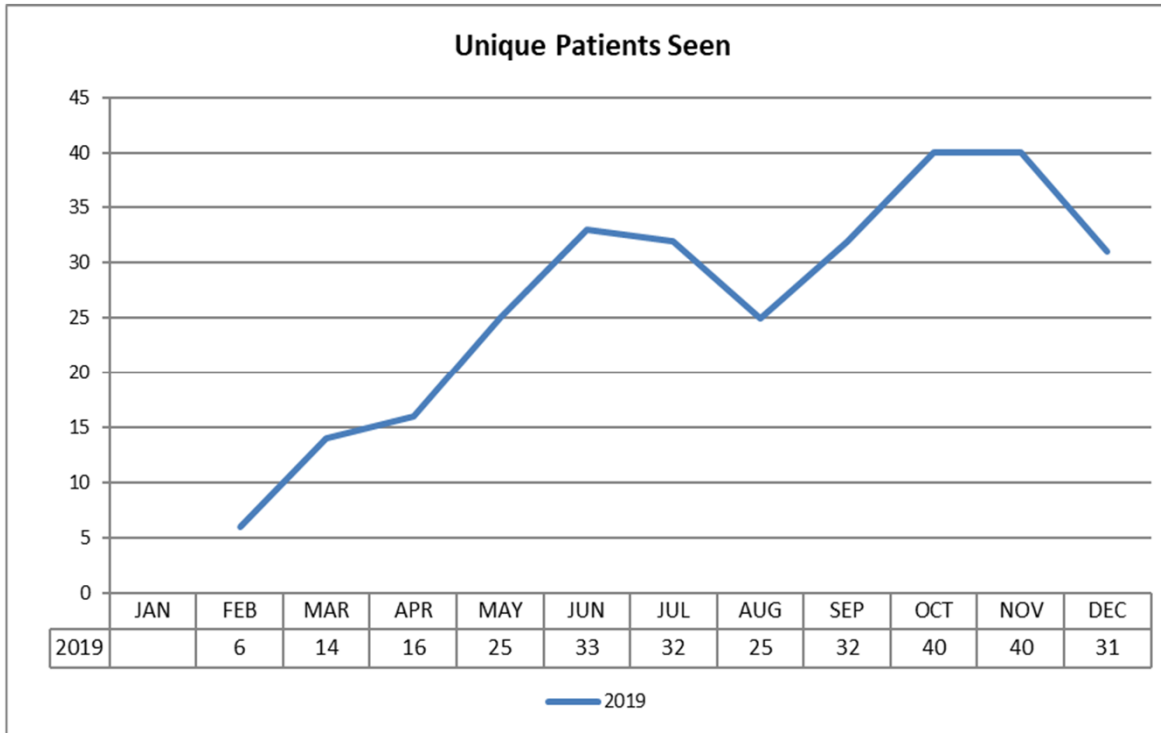


## Notes/Observations

- 501 total HC Visits in 2019
  - 361 AASD (72%)
  - 140 COA (28%)
- Hours increased from 20 to 40 hours on 10/1/2019
- Individual & family coaching
  - Outreach based on health assessment results
  - Classes (T2 Diabetes prevention)
  - Site specific education

\* Increased HC hours to 40/wk on 11/1/19

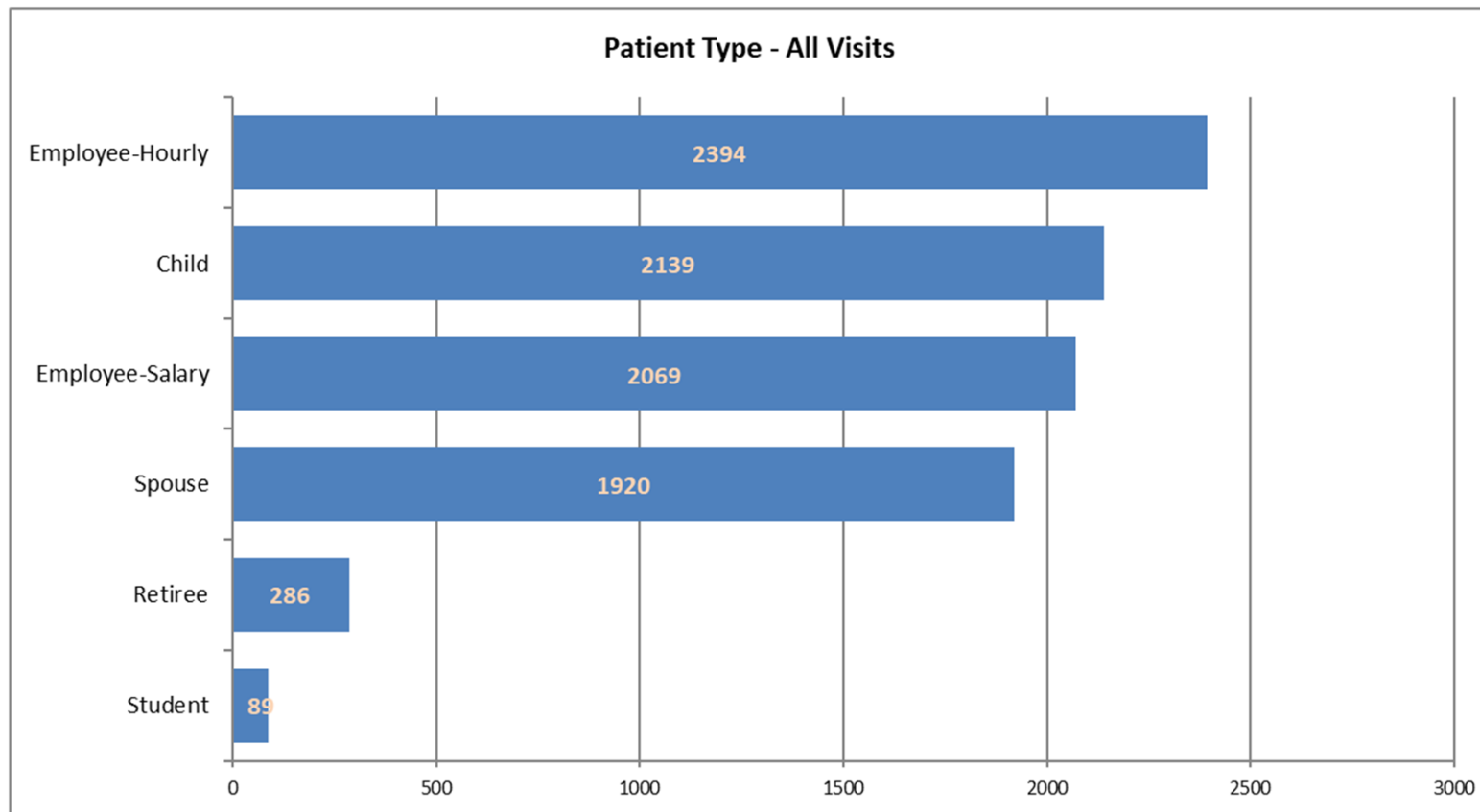
# Unique Health Coach visits



- 294 Unique Patients Seen in 2019
  - 200 AASD (68%)
  - 94 COA (32%)
- Promotion of other health and wellness offerings (EAP, preventative benefits available through health plan, etc)



# Patient Type – All Visits (YTD)



# Quality – Success Stories

- 11 year old male seen in PT with complaint of great toe pain (turf toe) since football (about 4months of pain). He is a catcher and was unable to do any baseball catching with this pain. 3 visits, back to baseball, back to catching.
- 56 year old female, complaints of right hip/ low back pain. 1 PT session with manual therapy (Manipulation, mobilization, dry needling) and was 90% better, one additional visit simply to finalize home exercise program as she was going on vacation. Pain had been present 2+ years.
- 42 year old male, shoulder surgery, 16 PT visits, fully back to pre surgery level.

# Quality – Success Stories

- A woman injured her foot at home and was scheduled to see our physical therapist the same morning. He came to me with concerns about a fracture, so an x-ray was ordered. A fracture was confirmed, and I was able to contact Orthopedic provider, who reviewed the x-ray and then contacted the patient to come in that afternoon for evaluation and management. It was seamless for the patient and much appreciated.
- A patient was going through a very difficult time with a family circumstance, and contacted us one afternoon after she experienced acute stress and panic. We were able to get her in within an hour, and referred her to EAP and discussed medication options. She was very grateful for the prompt attention.
- A patient was experiencing symptoms of a bad cold, and was concerned that he may need antibiotics. He was going to contact TeleDoc, but then instead saw that an appointment was available here. After evaluation that day, it was determined that he did not have an infection that would have warranted antibiotics, and he was given recommendations for his symptoms.

# Quality – Success Stories

- A high school wrestler had a skin lesion that the referee thought was possibly contagious, so wouldn't let him wrestle that weekend at a big tournament unless he was seen. The patient's mom had called the PCP office that day, which was a Friday, but they were unable to see him that day. She contacted our clinic, and we were able to get him in for evaluation, and determined that the lesion was not contagious. I was able to print off the wrestling clearance form online, and give it to the patient before he left. He was then able to wrestle that weekend. They were very grateful for our help.
- A woman had multiple skin tags for many years that became easily irritated by clothing and jewelry. She had mentioned them at her PCP visit, but was told it would be an extra cost to have them removed, which she couldn't afford. She heard that we can remove skin tags at our clinic, and made an appointment. I was able to remove at least 20 skin tags, and she was very happy with the results!

# Quality – Success Stories

- I had seen a gentleman about 6 months ago for cold symptoms, he was a smoker. Shellie counseled about smoking cessation. We discussed treatment options. He was not yet ready to quit. However, when he was ready, he wanted to try a prescription medication. So, I sent in the smoking cessation medication to his pharmacy for him to fill whenever he feels he would be ready. I recently had seen him at the clinic a few weeks ago. He did fill the medication, he is no longer taking it. He is now 2 months smoke free! He was able to quit successfully!
- At the COA Health Fair, an employee was stopped at our little CCC booth and telling a “new-insurance eligible” employee all about how great our clinic was, all we do, and how beneficial it is to have the clinic. He must have been a Dad because he said, “Yeah, the clinic had been so great for our family. Between myself, my wife and having 5 kids, this clinic has saved us hundred to probably thousands of dollars just last year alone! We have utilized it so much! You’re very lucky to have this insurance and this benefit, we have been very grateful”
- We have been seeing a lot of new eligible patients at the clinic! I STILL have been having some ask “Where do I pay?” after the visit is completed. Still, when I tell them their insurance covers all clinic costs and there is no expense to them, they have this look of bewilderment. I love it! A lot of people also are amazed by how much we have to offer here at the clinic as well, I provide them with all the info to new patients or patients not familiar with the services, Health Coach, Labs, Physical Therapy, etc.

# Quality – Success Stories

- New patient to clinic, woman in her early 30s, came to CCC for first time for evaluation of swollen lymph nodes in neck x 3 months. No other symptoms. She feels they are just more noticeable. She heard about the clinic through her husband, who carries the insurance, so decided to make an appointment to the clinic. No other significant medical or health history, has a 2 year old child, otherwise she is healthy. She does not have a PCP and has not seen one other than her OB/GYN as she has not felt the need to. Upon my exam of the nodes in neck, I did feel other nodes along the lymph chain extending into her clavicle area and shoulder area which was concerning to me, especially with her being young. I explained the findings as was able to get her into Ultrasound that day. The Radiologist actually contacted me personally and advised me the lymph node findings were highly suspicious and concerning may be malignancy. I talked to patient, and with the medical assistant, contacted Endocrine – I was able to get ahold of the actual Doctor there who looked at the Ultrasound report, and agreed with the concern, scheduled the patient the very next day to have evaluation, biopsy of nodes, and other tests. After biopsies, node excisions, lab testing, it did confirm that she had Hodgkin Lymphoma. This is a rare cancer, only diagnosed in approximately 200,000 in America each year. It also can be very aggressive and spread very fast once diagnosed. She had a head to toe scan to see if the cancer had spread, and thankfully, it was caught early enough, Stage 2, to where it had not metastasized to any other areas of her body – her prognosis for recovery was very good with surgery chemotherapy and radiation. She also was able to surgically harvest several ovarian eggs prior to her treatments/procedures just in case of wanting to conceive and have more healthy children in the future once she is well again! (gives me tears!). This was the best success story I personally has this last quarter here at the clinic. She wouldn't have come in or went in soon enough if this clinic weren't available, she did not have PCP established, and the timing couldn't have been better – it was a historically known aggressive cancer that was caught early enough in a young woman to have a good outcome and therefore, hope for a good healthy life to come!

# Quality – Success Stories

- Physical Therapy was doing an initial evaluation on a gentleman who had been having multi-joint pain for years off and on. The Physical Therapist also noticed that the patient was complaining of rashes that seem to “come and go” and also can be bothersome. They seem to correlate with when his joint pains seem to be at the worst times. Physical Therapist brought me in to the room to have a look at the rashes and gave report. I asked patient a few more questions. Came to a conclusion there is a strong chance he may have some type of immune/rheumatology underlying chronic condition which is why some of the typical over the counter medications, treatments, and PT may not be helping as much as they could be. I Referred him to Rheumatology. He was in fact subsequently diagnosed with Psoriatic Polyarthrititis. He was put on a monthly immunologic IV medication for this for management of this chronic disease. He did continue with therapy. He is starting to feel a difference a few months later, improvement which he hadn’t felt in “years”, and he thanked us for being observant to all the details of his ongoing pain. Without the clinic, physical therapy, he stated he would have just went along doing the same over the counter Tylenol/advil, but since PT is offered, he wanted to give it a try and see what else he could try. Then we got to the rashes, then the chronic underlying problem. Now he is able to get up in the morning and get to work feeling rested and not with as much stiffness and pain!

# Quality – Success Stories

- Had a patient walk in to the clinic in almost hysterics. She was crying uncontrollably and asking for our help, that she” is in pain, and she cant eat, and she cant stand being like this, and she doesn’t know what to do, and no one will help her. I just know you girls here, and I TRUST all of you here, please”. She had been to the clinic before and I was familiar with her. She had a surgery a couple months ago and has had some pain with it since. Overall, she had a lot of different factors weighing on her - stressors, both physically, emotionally. It seemed to all become too much at once and she felt like she was going to break down – so she came to the clinic, because she “trusted us”. Shellie was able to talk with her, and get her to a calmer state. We listened, were able to break down her concerns one by one, and see what we could do for her or what the next plan would be. We got her set up with Physical Therapy the next day just for consult on maybe what she can do to help relieve some of the discomfort from post-surgery or stretches, etc. I scheduled an extra 30 min and gave report to PT about the patient, I knew the PT would be great at being that positive reassurance and step-by-strep guiding force that I feel would be helpful. She left feeling better, she had a plan, and a follow up. We also were able to schedule her to see EAP as well that day to get the holistic healing process moving. Overall, I think other medical facilities likely would turn people away if this happened, but because we are able, and because we do are, and because we do get to establish those caring relationships with patients – we really do try to go out of our way to HELP them. The very best thing I see from these kind of situations is how we can schedule them for a follow up in a week, or a recheck. They do not have the extra stress of the cost of another appointment in a doctors office, which can be very helpful at times especially if they aren’t having the best experience at the moment. We can help get them back on track the healthy road ahead.



# Health Care Navigation

## Preventative Care and Referrals

- Preventative screenings
  - 34 Mammography referrals
  - 10 Colonoscopy referrals
- Imaging referrals
  - 92 X-rays
  - 20 CT
  - 25 Ultrasound
  - 3 MRI
  - 1 EMG
- Top Specialist referrals
  - 46 ENT
  - 25 Dermatology
  - 22 Orthopedic Surgery
  - 18 Sports Medicine
  - 18 Podiatry
  - 13 Hand Surgery
  - 12 General Surgery
  - 8 Allergy
  - 5 Pain Medicine
  - 4 Physiology/Rehab

# Patient Satisfaction – AASD

Collected 118 surveys in 4th Qtr

- 98% were seen when they wanted to be seen.
- 100% were satisfied with the care received.
- On a scale from 1 to 10, with 10 being extremely likely, rated a 9.8 for likelihood to recommend services.

# 4th Qtr Patient Comments – AASD

- I called in the morning and they were able to get me in that afternoon.
- I love coming here because I don't have to wait in the waiting room for a long time and they always get me in right away. I also love the option to schedule appointments online and see all the options I can choose from. The nurses and doctors are super sweet and you can tell they love getting to know their patients.
- Everyone was so nice, Jessica was so nice and made my son feel so comfortable - He usually is scared of going to the doctors.
- We love the Connecting Care Clinic and are always happy with the services.
- I love the convenience of this clinic. Heather Books is always so helpful. She even diagnosed my daughter's illness that her pediatrician and several ER visits missed. I love the online scheduling and that there is no cost. I also like that we can get any labs drawn, even if ordered by the family doctor.
- We have received amazing quality, thorough care every time we are here. Jess is so caring and takes care of the whole person.
- Very friendly clinic available to us!

# 4th Qtr Patient Comments – AASD

- Excellent service and friendly staff! We are very grateful for this service! Thank you!
- Have always been impressed with service at clinic.
- I was very impressed by the fast, professional, and expert health service. Thank you for this option for my health.
- Extremely informative, patient and willing to take the time to answer all your questions. Truly an amazing benefit especially in today's medical crisis society.
- Thank you Jessica and Mary for working me in on your schedule.
- I like the expansion of services.
- Shirley and Heather make an awesome team!
- I am thankful for this class.
- Thanks for the great service! I was able to be seen the same day and didn't have to wait when I arrived. I was in and out in a half hour! Thanks for answering all my questions.
- Thank you for this service.

# 4th Qtr Patient Comments – AASD

- Connecting Care has been a life saver for us. We love the care we receive at Connecting Care.
- We just started coming here; it is so efficient and the staff is very friendly!
- This is a great service that is offered to us. Just wish I could bring my 1 year old daughter here.
- I would have liked to come on Tuesday but there were no appointments remaining when I checked on Monday night.
- First time here. Was really pleased. Thank you,
- Always helpful, welcoming, on time & concise!
- Mary is so kind and efficient. Coming here is the only time going to the dr is enjoyable. Thank you so much for providing this service. Jess was very knowledgeable and kind as well

# 4th Qtr Patient Comments – AASD

- Very informative on the issues I was having. Would highly recommend to anyone.
- Excellent quality care and met my needs immediately. Friendly staff in all respects.
- Convenient location and hours are great.
- So nice to be able to be seen on the same day...love this clinic!
- Very friendly, quick service, and no waiting! Thank you for very much! We so appreciate having this

# Patient Satisfaction – City of Appleton

Collected 40 surveys in 4th Qtr

- 100% were seen when they wanted to be seen.
- 100% were satisfied with the care received.
- On a scale from 1 to 10, with 10 being extremely likely, rated a 9.9 for likelihood to recommend services.

# 4th Qtr Patient Comments – COA

- Very prompt and efficient
- Friendly staff and I seen right away. This is my first time here and will use it again
- Was very friendly visit
- I was late for my appointment because I thought it was a different time, Jessica was able to still see me! I have seen a Dermatologist for years and spent hundreds of dollars going to see them, I learned more about my condition from Jessica in 15 minutes than I ever have from hours with my dermatologist. This clinic is so great, always keep it available to us!
- Great staff and they take great care!
- The staff are very friendly and helpful.
- Compassionate care. Thanks!
- First time to clinic such an amazing service! Staff so kind and the doctor Jessica was so sweet! I will definitely be back thank you for providing this service to us
- The clinic is wonderful. Staff is always welcoming. Appts are very easy to come by.



# 4th Qtr Patient Comments – COA

- There is no waiting, you are in and out quickly with issue resolved.
- Connecting Care Clinic has been an extremely valuable benefit provided to city of Appleton employees.
- In the recent past, the scheduler has switched our provider from the one we scheduled with. We schedule with one particular provider because we have built our entire family's relationship with her. She knows us. All of us. This relationship is important to us. We have shared our concerns with our provider and she has suggested steps for us and her staff to take so our provider does not get switched on us. Our provider is receptive to our family's needs and was also in this particular situation. Thank you! This matters. Today, I had a need to be called due to inaccessible computer. The clinic obliged. I appreciated this effort to change your protectable.
- Always easy to schedule, always gotten in on time.
- So sad to hear Shellie is leaving the clinic, she is amazing' I have been coming here over the years and saw how clinic became what it is today from Shellie and Jessica only starting it in the beginning this place is the best place I've ever been to
- Love this clinic!

# 2019 Return on Investment Overall

## 2019 ROI SUMMARY

### AASD/COA

Month	Contracted Expense	Office Visit Savings	Lab Savings	Procedure Savings	Total Savings	ROI
January	\$ 73,558	\$ 79,770	\$ 10,147	\$ 57,399	\$ 147,316	\$ 73,758
February	\$ 73,288	\$ 61,644	\$ 7,471	\$ 41,608	\$ 110,723	\$ 37,435
March	\$ 87,988	\$ 79,394	\$ 8,492	\$ 48,592	\$ 136,478	\$ 48,490
April	\$ 87,988	\$ 79,750	\$ 8,628	\$ 48,598	\$ 136,976	\$ 48,988
May	\$ 92,984	\$ 76,125	\$ 9,446	\$ 54,432	\$ 140,003	\$ 47,019
June	\$ 85,997	\$ 54,683	\$ 7,652	\$ 51,846	\$ 114,181	\$ 28,184
July	\$ 85,989	\$ 65,665	\$ 7,240	\$ 61,229	\$ 134,134	\$ 48,145
August	\$ 77,688	\$ 60,915	\$ 9,959	\$ 57,808	\$ 128,682	\$ 50,994
September	\$ 70,474	\$ 64,235	\$ 8,297	\$ 46,878	\$ 119,410	\$ 48,936
October	\$ 87,022	\$ 91,330	\$ 11,043	\$ 74,344	\$ 176,717	\$ 89,695
November	\$ 79,294	\$ 85,692	\$ 10,001	\$ 62,304	\$ 157,997	\$ 78,703
December	\$ 89,333	\$ 95,152	\$ 8,033	\$ 57,633	\$ 160,818	\$ 71,485
<b>YTD</b>	<b>\$ 991,603</b>	<b>\$ 894,355</b>	<b>\$ 106,410</b>	<b>\$ 662,671</b>	<b>\$ 1,663,436</b>	<b>\$ 671,833</b>

#### Notes:

Lab, procedure and office visit savings estimated based on insurance cost.



# ROI Observations & Analysis

- 2019 Total Savings for AASD  
(procedures/labs/provider visits): \$1,131,136
- 2019 Total ROI for AASD: \$456,846
  
- 2019 Total Savings for City of Appleton  
(procedures/labs/provider visits): \$532,299
- 2019 Total ROI for City of Appleton: \$214,986

# RECRUITMENT STATUS REPORT

UPDATES THRU 03/05/2020

STAFF PERSON	POSITION	DEPT.	Date of Vacancy	# of Openings	STATUS
<b>KIM</b>	Bus Driver	VT	Multiple	4	Determining next testing date. Application deadline 4/26/20.
	Part-Time Bus Driver	VT	N/A	N/A	Determining next testing date. Application deadline 4/26/20.
	Travel Training Specialist	VT	New Position	1	Panel Interviews 3/16/20.
	Operator I - DPW	DPW	8/26/19	2 + Elig. list	Tyler Tennesen starting 3/23/20. Background and references pending on 1 candidate. New Process: Application deadline 3/15/20.
	Lead Person - Street	DPW	1/3/20	1	Pending results of Top Candidate's Dr. Fico appointment.
	Part-Time Service Person	DPW	1/18/20	1	Pending decision after panel interviews.
	Erosion Control Inspector	DPW	3/1/20	1	Application deadline 3/8/20.
<b>ALLISON</b>	Police Officer	Police	NA	1 + Elig. list	Derek Lahti starting 6/1/20. Background pending on 1 candidate. New Process: Accepting applications
	Community Service Officer (CSO)	Police	NA	1	Chief Interviews 3/12/20 & 3/13/20.
	Fire Fighter	Fire	N/A	N/A	Samuel Felauer, Tyler Rusch, Jake Laack, Lukas Syrjamaki & Ryan Monaghan starting 4/20/20.
	Battalion Chief – Resource Development & Special Operations	Fire	3/2/20	1	Application deadline 3/29/20.
	Library Operations Clerk Sub (Custodian)	Library	1/2/20	1	Third Process: Application deadline 3/29/20.
	Library Safety Supervisor	Library	New Position	1	Defining process.
	Health Officer	Health	6/5/20	1	Application deadline 3/29/20.
	Assistant City Attorney II	Legal	5/1/20	1	Amanda Abshire promotion. Application deadline 3/29/20.

**TOTAL POSITIONS OPEN = 17 TOTAL ELIGIBILITY LISTS = 2**

## POSITIONS ON HOLD

STAFF PERSON	POSITION	DEPT	Date(s) of Opening(s)	# of Openings	Person Vacating Position/Status
<b>ALLISON</b>	Systems Analyst	IT	7/6/15 & 9/6/19	2	Using part-time temporary staffing to fill current need.
	Weights & Measures Specialist - .5 FTE	Health	1/13/20	1	Waiting for "Request to Fill".
	Clerk	Library	4/2/20	1	Teri Kolosso retirement, 4/1/20. Waiting for "Request to Fill".

**TOTAL POSITIONS ON HOLD = 4**

**Note: Part time non-benefited positions do not (per Recruitment Policy) require authorization outside the department. The Mayor has asked departments to scrutinize.**