



City of Appleton

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

Meeting Agenda - Final-revised Human Resources & Information Technology Committee

Wednesday, July 17, 2019

6:30 PM

Council Chambers, 6th Floor

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

[19-1013](#) Minutes from 5-22-19

Attachments: [Minutes 5-22-19.pdf](#)

4. Public Hearings/Apearances

5. Action Items

[19-1012](#) Request to approve Public Works table of organization change a CEA Serviceperson position to a CEA Master Mechanic position.

Attachments: [DPW reog Serviceperson to Mechanic.pdf](#)

[19-1018](#) Request to approve changes to the Salary Administration Policy.

Attachments: [Salary Administration Policy 7-17-19.pdf](#)

[19-1019](#) Request to approve changes to the Travel Policy.

Attachments: [Travel Policy Summary of Changes 7-17-19.pdf](#)
[Travel Policy 7-17-19.pdf](#)

[19-1040](#) ORGANIZATIONAL MATTER
Election of Vice-Chair

6. Information Items

[19-1016](#) Pay for Performance program update

[19-1017](#) Elected Officials salaries

[19-1014](#) Recruitment Status Report 7/11/19

Attachments: [RSR thru 7-11-19.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

Wednesday, May 22, 2019

6:30 PM

Council Chambers, 6th Floor

1. Call meeting to order

2. Roll call of membership

Present: 4 - Raasch, Van Zeeland, Thao and Siebers

Absent: 1 - Spears

3. Approval of minutes from previous meeting

[19-0748](#)

Minutes 4-24-19

Attachments: [Minutes 4-24-19.pdf](#)

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

Aye: 4 - Raasch, Van Zeeland, Thao and Siebers

Absent: 1 - Spears

4. Public Hearings/Appearances

5. Action Items

6. Information Items

1. [19-0740](#) Pay for Performance demonstration

Attachments: [P4P info.pdf](#)

This Presentation was presented

[19-0741](#)

Discussion of what committee will need from HR staff in order to set bargaining parameters.

This Presentation was presented

2. [19-0742](#) Discussion on what information is needed from staff in order for committee to be able to set the City Attorney and Mayor salaries for the next 4 year term.
Attachments: [elected official info.pdf](#)
This Presentation was presented
3. [19-0736](#) Changes to Accident Investigation & Reporting policy
Attachments: [ACCIDENT REPORTING AND INVESTIGATING 2019.pdf](#)
This Presentation was presented
5. [19-0737](#) Changes to the Interpreter policy
Attachments: [Interpreter Policy 2019.pdf](#)
This Presentation was presented
6. [19-0738](#) Changes to the Seasonal Employment policy.
Attachments: [Seasonal Employment policy 2019.pdf](#)
This Presentation was presented
7. [19-0746](#) Changes to Conditions of Employment policy.
Attachments: [CONDITIONS OF EMPLOYMENT.pdf](#)
This Presentation was presented
1. [19-0532](#) ORGANIZATIONAL MATTERS
Elect a Vice-Chair - Alderperson VanZeeland
Set meeting date/time - Wednesday at 6:30 pm
Designate a contact person - Director Matz
This Report Action Item was presented
4. [19-0745](#) Update on pending Human Resources staffing changes in June.
Attachments: [HR Staff Transitions.pdf](#)
This Presentation was presented
8. [19-0739](#) Recruitment Status Report 5/17/19
Attachments: [RSR thru 5-16-19.pdf](#)
This Presentation was presented

7. Adjournment

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

Aye: 4 - Raasch, Van Zeeland, Thao and Siebers

Absent: 1 - Spears



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

MEMO

TO: Human Resources Committee

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

DATE: July 8, 2019

SUBJECT: Proposed Department of Public Works Table of Organization change converting a CEA Serviceperson position to a CEA Master Mechanic position.

The Department of Public Work's current Table of Organization includes 9 Master Mechanics and 1.5 Servicepersons. The Servicepersons are required to have a Commercial Driver's License and hold the same certifications as our Master Mechanics.

Our full-time Serviceperson performs minor maintenance, preventative maintenance and oil changes on the vehicles within our CEA fleet. In essence, this position is performing mechanic type duties, but being compensated at a significantly lower rate than a master mechanic.

With the recent resignation of our current Serviceperson, we reflected on how the days of "getting your foot in the door and gaining experience" is not enough to retain employees. Instead, we need to compensate them accurately for the work they are expected to perform. In this case, the position is performing mostly mechanic duties, and therefore, should be compensated as a mechanic.

Our current process is to have the Master Mechanics repair the vehicle (i.e engine diagnostics, welding, brake repairs, etc.) and then the Serviceperson would perform the oil change. If the proposed Table of Organization is approved, the Mechanics would also perform the oil change at the time they are repairing any vehicle that has an upcoming oil change due. This will help us be more efficient and provide a higher level of service to our customers.

Therefore, I request approval of the attached proposed Department of Public Works Table of Organization change converting a CEA Serviceperson to a CEA Master Mechanic.

Attachment

C: Sandy Matz, Human Resources Director

CITY OF APPLETON PERSONNEL POLICIES	TITLE: SALARY ADMINISTRATION	
ISSUE DATE: February 18, 2005	LAST UPDATE: September 4, 2001 February 2006 September 10, 2003 October 2006 February 18, 2004 July 2008 February 17, 2005 August 2009 December 2011 September 2012 September 2013 July 2014 April 2018	SECTION: Human Resources
POLICY SOURCE: Human Resources Department	AUDIENCE: All regular full and part-time benefited employees covered by the Non-represented compensation plan. Excludes represented employees.	TOTAL PAGES: 7
Reviewed by Legal Services Date: December 2000 September 12, 2003 February 2006 September 2009 August 2013 July 2014 March 2018	Committee Approval Date: March 9, 2000 September 24, 2003 May 12, 2004 February 9, 2005 February 22, 2006 July 23, 2008 October 28, 2009 December 12, 2011 September 24, 2012 September 9, 2013 August 11, 2014 October 6, 2014 April 11, 2018	Council Approval Date: March 15, 2000 October 1, 2003 May 19, 2004 February 16, 2005 March 1, 2006 August 6, 2008 November 4, 2009 December 21, 2011 October 3, 2012 September 18, 2013 August 20, 2014 October 15, 2014 April 18, 2018

I. PURPOSE

To outline the guidelines utilized for administration of the compensation plan.

II. POLICY

It is the policy of the City of Appleton to provide competitive compensation to attract and retain competent staff and to encourage and reward superior performance within the financial resources available.

III. DISCUSSION

This policy provides the current salary administration guidelines. This policy is subject to change with approval of the Common Council. The Human Resources Director shall be responsible for the administration of the compensation policy.

IV. DEFINITIONS

A. Fair Labor Standards Act (FLSA): A federal act that sets minimum wage, overtime pay, equal pay, record keeping and child labor standards for employees who are covered by the act and who are not exempt from specific provisions. An employee classified in the compensation plan as "Exempt" is not eligible for the overtime compensation provisions of FLSA.

B. Base Pay: An employee's initial rate of compensation, excluding extra lump sum compensation, shift

differential etc. An employee's base pay can be expressed as a base hourly rate of pay or as an annual salary.

- C. Compensation Plan: A schedule of pay ranges listing the job classifications Minimum, Maximum and Control Points. All regular positions shall be placed in one of these ranges based on a job questionnaire and point factor job evaluation.
- D. Emergency: For purposes of this policy, an emergency shall be defined as an unplanned, significant event that affects the operation, or service level of the department (as determined by the Department Director and/or the Mayor)
- E. Interim Assignment: When an employee is assigned to a different position on a temporary basis, because of a vacancy.
- F. Job-Questionnaire (JQ): A job analysis that outlines the responsibilities and the requirements necessary to perform the functions of the position. The JQ is utilized to evaluate the position responsibilities using the City' point factor job evaluation system for allocation to the appropriate pay grade. A JQ also functions as the key document for pay plan maintenance.
- G. Non-base pay adjustment: Pay adjustments generally in the form of a lump sum or other forms that do not increase the employee's base pay.
- H. Red-circled: The maintenance of an employee's pay rate above the established range maximum. An employee whose pay rate is at or above the range maximum may be eligible for a non-base performance adjustment.

V. PROCEDURES

A. DETERMINATION OF PAY RANGES

The compensation plan shall be based on the principle of equal pay for equal work. Pay ranges within the compensation plan shall be determined with regard to factors including, but not limited to: uniformity of pay for each class; relative difficulty, complexity, and responsibility of work; competitive recruiting, education and experience requirements; and prevailing rates of pay for similar jobs in public and private employment as determined by the City.

B. ENTRANCE PAY RATE

The entrance pay rate shall be within the Minimum and the Control Point of the pay range. All appointments (including department heads) above the Control Point must be authorized, in advance, by a majority of the Mayor, Human Resources Committee Chair and Human Resources Director.

- C. RECLASSIFICATION The Position Classification Review Process is the method for determining pay range assignment of new positions or reclassification actions involving substantial changes in the duties and responsibilities of an existing position.

(a) Classification or Reclassification Consideration

A request for reclassification of a current position or the classification of a new position may be initiated by a staff member seeking reclassification, by the staff member's department director, or by the Human Resource Director. Requests for reclassifications may occur throughout the year as positions are created or become vacant.

Reclassification consideration for existing positions requires that the employee and the department director document substantial changes in existing duties since the most recent review. Duty changes may be from substantial, immediate reassignment of duties due to reorganization, or may be the result of a logical and gradual change of responsibilities over a period of time.

To be considered for reclassification, changes should be stable and typically should have been in effect for at least six months preceding the reclassification request so that it is clear that the changes that exist are likely to remain for some period of time. Reclassification will not be considered for temporary changes in duties.

A request for classification or reclassification consideration must be in writing and include a new JQ with notes indicating duties that have changed since the last review. The Questionnaire must be completed and signed by the employee, then reviewed and signed by the supervisor and department director. The supervisor and department director must verify or comment on the accuracy of the responses.

(b) Review of Requests

Following internal review by the Human Resource Director, the Human Resource Director may submit the Questionnaire and any supporting documentation to the consultant for evaluation if the criteria for reclassification is met. If the reclassification is appropriate, the consultant will recommend a grade assignment for the position. The consultant may request further information from the Human Resource Director and may request that other positions affected by the reclassification changes be reviewed as well.

(c) The Employer's Response to the Consultant's Recommendations

The employee and the department director will be informed of the final decision in writing. The effective date of any compensation changes will be based on the specific circumstance of the reclassification.

D. COMPENSATION PLAN COMPONENTS

(a) Pay Range Adjustment

Pay Range adjustments are typically made on an annual basis. The Human Resources Director shall recommend such adjustments to the Mayor and Finance Director based on the general level of pay adjustments in the job markets where the City competes for its staff, as well as internal adjustments (e.g. collective bargaining settlements). These adjustments are also made in consideration of general changes in cost-of-living indices.

The adjustment takes the form of an adjustment to pay ranges with the goal of maintaining market competitiveness of the pay plan.

No increase will be made to an employee's pay as a result of a pay range adjustment.

(b) Pay for Performance

The amount allocated for performance pay shall be established each year by the Mayor and included in the annual budget, subject to approval by the Common Council. Upon approval of the budget the amount will be divided and allocated to each individual department based on total base wages of eligible employees within the plan. Upon conclusion of the annual employee performance review process, individual department directors will then divide the allocated amount to individual employees within their department based on the employee's annual performance evaluation score.

The maximum Pay for Performance Adjustment shall not exceed the approved Pay Range Adjustment plus 3%.

E. PAY RATE ADJUSTMENTS

The Human Resources Director and the applicable Department Director shall determine the pay status of an employee based on the following:

- (a) Transfers - When an employee is transferred from one class to another with a common pay range, he/she shall continue to receive the same pay rate unless a different rate is deemed appropriate.
- (b) Promotion - When an employee is promoted from one class to another having a higher pay range, he/she shall receive an increase as deemed appropriate but not to exceed the Control Point of the range unless approved by the Committee as outlined in the above Entrance Pay Rate section. If the employee's pay rate is higher than the control point of the new position prior to promotion, no authorization is needed from the Committee. For consideration of placement into the new salary range, such factors as the average value of overtime lost, average value of extra hours worked in a non-exempt capacity as well as other internal and external factors shall be considered.
- (c) Demotion - When an employee accepts a position in a lower pay grade for any reason, a rate of pay shall be determined. For consideration of placement into the new salary range, such factors as experience, qualification, length of service, average value of overtime lost and the level of pay similar to employees in the pay range shall be considered.
- (d) Upward Re-Classification - When an employee's position is reclassified into a higher pay grade, the reclassification shall be treated the same as a promotion under (b) above.
- (e) Downward Re-Classification - When an employee's position is reclassified into a lower pay grade, the reclassification shall be treated the same as (c.) above.
- (f) Equity Adjustments
Equity adjustments are salary changes outside of the normal salary programs (as listed above) to remedy salary issues such as external pressure in high demand areas, internal salary compression, and/or retention considerations.

F. MINIMUM AND MAXIMUM RATES

Generally, an employee shall be paid within the pay range of his/her position.

An employee may be paid below the minimum of his/her pay range as the result of not receiving a pay adjustment due to their performance.

An employee who receives a base pay adjustment cannot exceed the maximum of their pay range.

In the event of a reclassification, or re-evaluation of a pay range that results in an employee's pay falling outside the maximum of the newly assigned pay range, such employee's pay rate may be red-circled.

G. OVERTIME

- (a) Employees in the Compensation Plan who meet the exemption under the Fair Labor Standards Act shall be exempt from all premium pay provisions except as otherwise outlined in this policy.
- (b) Employees who are required to work Sunday, not part of their regular schedule, shall receive double time pay. Utility Department employees who work Sunday, as part of their regular schedule, shall receive double time pay.
- (c.) All non-represented non-exempt employees in the Compensation Plan shall be paid no less than the minimum compensation required pursuant to the FLSA, including overtime compensation on a time and one half basis, for all hours worked in excess of 40 hours per week subject to the following:
 - 1. Compensatory Time, Sick leave, ~~PTO-Sick~~, approved non-paid leave, and FMLA [Comp, Sick, and](#) non-paid leave hours shall not be counted as hours worked for purposes of computing overtime compensation; and,
 - 2. Scheduled City holiday hours, [Floating Holiday](#), vacation, PTO, funeral leave, jury duty and approved paid FMLA leave (except FMLA Compensatory Time and Sick leave [as outlined in #1](#) above) may be counted as hours worked for purposes of computing overtime compensation (except when employee is called to work, then see #3 below); and,
 - 3. Hours worked and paid at a Sunday or Holiday double time rate*, where the employee is also paid an additional call pay premium, shall not be counted as hours worked for purposes of computing overtime compensation.

*Holiday double time rate refer to Fringe Benefit Policy.

- (c) Battalion Chiefs and Deputy Fire Chiefs who fill in for other Chief Officers, when overtime would otherwise be required, shall receive straight time pay for all such hours worked in addition to his/her regular bi-weekly rate. Operations Battalion Chiefs who are required by the Chief to attend extended (generally more than four (4) hours) training on his/her off-duty time may be eligible for straight time pay for attendance at such training at the discretion of the Fire Chief.
- (d) Police Lieutenants and Captains will receive compensation at time and one half of the top senior sergeant rate when working beyond their normal schedule for Grants, Off-Duty Police Services, Avenue Detail and special events.
- (e) Overtime shall be approved in advance by the Department Director or supervisor and reviewed

periodically by the Department Director. Overtime shall be kept to a minimum and shall be utilized to relieve specific occasional peak workloads or emergencies.

H. SHIFT PREMIUM

Non-exempt employees shall be eligible for a \$.50 shift premium added to their base pay if the employee is regularly scheduled (through shift selection or designated assignment) to work a 2nd or 3rd shift schedule (3rd or 4th shift schedule for Police).

K. TELEPHONE CALL

Non-exempt employees who are called by a supervisor on the telephone, outside of his/her regularly scheduled hours, to provide information related to the operation of the department shall be paid for the time actually spent on the telephone, but not less than one hour's straight time. This does not apply to employees receiving the Stand-by Duty pay.

L. EMERGENCY CALL-IN

Non-exempt employees who have left the worksite or are in a paid leave status, and who are called to return to work outside of their regularly scheduled hours to handle emergency situations that could not be anticipated, will be eligible for a lump sum of \$100 as call-in pay.

M. ASSIGNED SHIFT CHANGE

This applies to Department of Public Works and Utilities employees who operate on shifts.

When a non-exempt employee is required to work outside their assigned shift he/she will be paid as follows:

Employees notified for a change of assigned shift for a duration of more than one week and are given 48 hours or more notice shall be paid \$1.00 per hour, added to their base pay, for all hours worked for the duration of the scheduled shift.

Employees notified for a change of assigned shift for a duration of one week or less and are given 48 hours or more notice shall be paid \$2.00 per hour, added to their base pay, for all hours worked for the duration of the scheduled shift.

Employees notified for a change of assigned shift and are given less than a 48 hour notice shall be paid \$50 per day for the first 48 hours and then the employee shall be paid pursuant to the above.

The \$1.00 and \$2.00 premium pay shall be added to the employee's regular base rate for purposes of calculating the overtime rate.

O. STAND-BY DUTY

Employees who are required by his/her department director to be on stand-by duty (required to remain within a one (1) hour response area, accessible by phone or pager, etc.) shall receive one hour's pay for each day of stand-by and (2) two hours if on the actual holiday (does not include the observed holiday).

All employees required to be on stand-by must remain physically fit and ready for duty and must continue to abide by City policies (i.e., Drug-Free Workplace).

P. CALL DUTY - EMERGENCY RESPONSE (Excludes Directors, Deputy Directors and Assistant Police Chief)

Any exempt employee, not on Stand By Duty, who is required to report to duty for emergency operations (e.g. snowplowing, water main breaks, facilities and grounds and technology issues, storms & other disasters, police investigations, SWAT calls etc.) may be eligible for additional compensation in the form of a bonus as outlined below:

- ◆ If the employee reports for work and works more than one (1) hour but less than four (4) hours, the employee shall be entitled to \$50.00 for each report.
- ◆ If the employee reports for work and works four (4) hours or more, shall be entitled to \$200.00 for each report.

SUMMARY OF MAJOR CHANGES TO THE CITY OF APPLETON TRAVEL POLICY

Below is a summary of the primary changes to the City's Travel Policy:

- **Purpose:** modified to reflect that travel is seen as an investment in our employees (versus just a business expense).
- **Pre-approval:** previously, only the supervisor had to pre-approve any travel/training expenses. It was modified to add the Department Director's pre-approval prior to incurring any expense. The Library Board would still approve any Library employee expenses.
- **Airline Travel:** employees are now expected to search for the lowest overall cost to travel, including the expectation that they search out fares from all major airlines within a 120-mile radius (not just what is most convenient for the employee).
- **Rental Vehicles:** vehicle rentals are only allowed under extenuating circumstances (e.g., if the training class is too far away for a shuttle and there is no other way to get to the training). To reduce liability, employees must purchase the auto liability insurance from the rental company.
- **Mileage Reimbursement:** was clarified to allow reimbursement for travel beyond a 15-mile radius of the employees' usual work facility or residence (whichever is closer). The monthly mileage reimbursement was reinstated for those employees who regularly drive for their positions and who do not have regular access to a City vehicle. Department Directors would identify these positions. Department Directors and Deputy Directors are not eligible for this allowance without pre-approval from the Mayor.
- **Lodging:** reimbursement for lodging is now available when the employee travels beyond 60 miles for training/travel which requires an overnight stay (the previous standards was 120 miles).
- **Meal Reimbursement:** instead of using the IRS Standard Per Diem which varied by state and city, employees are now eligible to receive the CONUS meal and incidental rate when travelling overnight.
- **Parking and Transportation:** receipts are only needed for single transactions of more than \$50.
- **Spousal/Guest Travel:** employees should advise their supervisor if they are bringing a guest with them when traveling for City business.
- **Training Evaluations:** training evaluations (or equivalent documentation) are now required for training/travel events that incur more than \$1000 expense (previously \$500).
- **Training Form:** modified to include the current CONUS and mileage reimbursement amounts (to mitigate the employee needing to search for the amounts each time) and to reinforce the need to provide the required documentation prior to being reimbursed.

CITY OF APPLETON POLICY		TITLE: TRAVEL POLICY	
ISSUE DATE: Original Policy Date Unknown	LAST UPDATE: 5/6/04, 5/16/05 9/9/05, 11/1/05 6/2/06, 12/6/06, 2/8/07, 7/19	SECTION: Finance	FILE NAME: Travel Policy
POLICY SOURCE: Finance Department			TOTAL PAGES: 3+attachments
Reviewed by Attorney's Office Date: 5/7/04, 12/6/06		Finance Committee Approval Date: 5/12/04, 11/22/06, 2/14/07	Council Approval Date: 5/19/04, 12/6/06, 2/21/07

I. Purpose

To provide guidelines for employees for the reimbursement of training and travel incurred during the conduct of City business.

II. Policy

The City believes in investing in employees to help them grow. The City will reimburse employees for reasonable travel costs incurred while on official authorized City business. Employees, in turn, are asked to respect and value this investment, and travel at the lowest reasonable cost.

III. Guidelines

- A. **Pre-Approval:** All travel is required to be approved by the employee's supervisor and Department Director or designee prior to registration or incurring any expense. Out-of-state travel must have the Mayor's approval prior to incurring any expense. (Library Board President approves Library expenses.)
- B. **Post-Approval:** Supervisors are required to review and approve all expense reimbursement requests before sending the reimbursement request form to the Department Director or Mayor.
- C. **Use of Procurement Card:** City-issued procurement cards can be used for travel related expenses other than meals. When using City-issued procurement cards, the card should be used to pay for only the employee's own expenses. The employee should attach copies of all supporting documentation ~~on~~ to his/her travel report for all procurement card charges.
- D. **Out-of-State Travel:** All out-of-state travel is required to be approved by the Mayor or Library Board (for Library Personnel) prior to registration or incurring any expense.

Non-exempt employees who travel out-of-state for training are paid for their travel time based on-air travel time (unless stated differently in the employee's bargaining contract). If the employee chooses another means of transportation, any resulting additional time required for travel shall be charged to the employee's paid leave.

- E. **Airline Travel:** Employees are expected to travel coach class; to search for the lowest available overall cost for flight, mileage, paid time (for non-exempt staff), and airport parking fees, including from all major airlines within a 120-mile radius; and to reserve as far in advance as practical. Baggage fees are reimbursable for one suitcase and one carry-on bag. The cost of cancelling and/or rebooking of flights is not reimbursable unless it can be shown that it was necessary or required for legitimate business reasons (e.g., a changed meeting date) or extraordinary circumstances.

- F. **Rental Vehicles:** Rental vehicles are not eligible for reimbursement except under extenuating circumstances (see below). For transportation to/from the training, etc., employees should use other means such as shuttles, taxi cab, etc.

If extenuating circumstances necessitate the need for a rental car while traveling, the employee should obtain approval of their Department Director prior to renting the vehicle. The employee may use a City-issued procurement card to rent the vehicle and must purchase the auto liability insurance from the rental company.

- G. **Mileage Reimbursement:** Mileage reimbursement is available for employees who do not have regular access to a City vehicle and who travel beyond a 15-mile radius from the employee's usual work facility or residence (whichever is closer) for City business (the total round trip would be 30 miles or more). Mileage reimbursement for the use of the employee's vehicle is based on the standard IRS mileage rate in effect. The mileage reimbursement should be calculated as the difference between the training/travel event location and the employee's usual City work facility or residence (if driving to training/travel event directly from home), whichever is less. Commuting expenses between an employee's residence and his/her normal place of business are not eligible.

For positions that are expected to use their personal vehicle to travel for work on a regular basis, Department Directors may designate these positions to receive a \$30 monthly local mileage allowance (prorated for positions that work less than full-time). Directors and Deputy Directors are not eligible for this allowance without pre-approval from the Mayor. This per diem is subject to payroll taxes according to IRS regulations. For all other positions, mileage incurred within the City limits or between City facilities is not reimbursable.

- H. **Lodging:** Training classes/Events within 60 miles of City Hall are not eligible for overnight lodging. For travel/training more than 60 miles away, overnight lodging for the night before the conference up to and including the night before the last day of the conference is reimbursable at a single, standard room rate.

- I. **Meal Reimbursement:** Employees are eligible to receive up to the Wisconsin U.S. General Services Administration (GSA) Standard Continental United States (CONUS) meal and incidental rate for meals they consume when traveling overnight for approved City training/travel. Employees are not eligible for meal reimbursement for any meals that are included in the training/program or provided by the hotel, or meals that are not purchased/consumed by the employee. This per diem is not subject to payroll taxes according to IRS regulations.

- J. **Parking and Transportation:** The cost of parking fees, tolls and taxis, shuttles, and rideshares to/from the training is reimbursable. Receipts will be required for expenses that are more than \$50 per single transaction.

- K. **Tips:** Tips for meals are included in the meal and incidental rate in I above. All other tips are not reimbursable.

- L. **Spousal/Guest Travel:** Any additional costs incurred due to a spouse/guest traveling with the employee is not eligible for reimbursement. If an employee is bringing a guest (e.g., spouse, family, friend) with them, the employee should advise his/her supervisor before traveling.

- M. **Fines:** Fines (e.g., traffic or parking) resulting from traveling on City business are not reimbursable.

- N. **Miscellaneous Expenses:** There may be other miscellaneous reimbursable expenses from time to

time. Examples include books or supplies needed for a conference and telephone calls for City business. Miscellaneous expense reimbursements are subject to review for reasonableness by the Department Director and for City-wide consistency by the Finance Director.

- O. **Policy Exceptions:** Any exception to this policy must have the approval of the employee's supervisor and Department Director (Department Directors would need Mayor's approval). Requests for the exception should document extenuating circumstances or proposed overall savings to the City.

IV. Procedure

- A. A separate "City of Appleton Travel Report" will be completed for each employee and each event (Appendix A).
- B. Travel expense reimbursements to employees will be incorporated into their payroll payments. Since these payments will represent reimbursement of business expenses, no payroll taxes will be withheld.
- C. For any training event incurring over \$1,000 total expense, a Training Evaluation form (or equivalent documentation) must be completed within 30 days after the training. See Appendix B.

1. TO BE FILLED OUT COMPLETELY BEFORE REGISTRATION OR INCURRING COSTS

Employee/Department Requesting Travel: _____ / _____

Title of Training or Purpose of Travel (**must attach brochure/agenda**): _____**City/State of Training/Event** (Mayor approval required for **all** employees' out-of-state travel): _____

Dates (time) request to be out of the office: _____ / ____ (____ AM/PM) through _____ / ____ (____ AM/PM)

Are there other City employees attending this training/event as well? If so, why?
_____Estimated Costs (*variance of more than \$100 need to be explained on reverse side upon return)

		Details (e.g. vendor name, specific expenses)
Registration Fee:	\$ _____	_____
Lodging:	\$ _____	_____
Airfare:	\$ _____	_____
Meals (based on per diem rate):	\$ _____	_____
Other (e.g. rental car, mileage):	\$ _____	_____
Overtime for your attendance:	\$ _____	_____
Overtime to cover your vacancy:	\$ _____	_____
TOTAL:	<u>\$ _____</u>	<i>*If the total equals \$1000 or more, attendees must complete and submit an evaluation form upon return.</i>

How does this training/travel help meet your individual, departmental or organizational goals?

Date Submitted to Supervisor: _____ / _____ / _____

SUPERVISOR'S RESPONSE:

Authorized Date of Departure and Return: _____ - _____ Budget Account: _____

I authorize this employee to register for this training and incur these travel-related expenses (as detailed above).

Supervisor Signature_____
Date_____
Mayor Signature_____
Date(for **all** out-of-state training and Department Director's requests)_____
Department Director Signature_____
Date**2. REGISTRATION PAYMENT IN ADVANCE. IF USING PROCUREMENT CARD, CHECK BOX AND SKIP TO SECTION 3.**

- ☐ Paid with procurement card. Skip to Section 3.
- ☐ Please pay my registration in advance (submit this form to Finance).

Amount: \$ _____ (enter on lines 7 & 11 in Section 3)

Due to Vendor by: _____ / _____ / _____

Vendor: _____

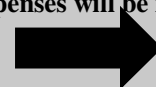
Attn: _____

Address: _____

City/State/Zip: _____

Note: Advance payments will be made for registration only. All other items should either be charged on a procurement card (if eligible) or will be reimbursed.

Complete reverse side upon completion of travel, or if no other expenses will be incurred.



**3. ACTUAL EXPENSES: EMPLOYEE MUST COMPLETE UPON RETURN (SUBMIT TO FINANCE).
TRAINING BROCHURE AND REQUIRED DOCUMENTATION MUST BE SUBMITTED PRIOR TO REIMBURSEMENT.**

Current 2019 per diem rate: Breakfast (\$14.30); Lunch (\$15.40); and Supper (\$25.30)

Date	M	T	W	R	F	S	S	
1. Lodging:	\$	\$	\$	\$	\$	\$	\$	\$
2. Breakfast:	\$	\$	\$	\$	\$	\$	\$	(no receipts required) \$
3. Lunch:	\$	\$	\$	\$	\$	\$	\$	(no receipts required) \$
4. Dinner:	\$	\$	\$	\$	\$	\$	\$	(no receipts required) \$
5. Parking/Tolls/Taxi (receipts only required for single transactions of more than \$50):								\$
6. Airfare/Taxis:								\$
7. Registration:								\$
8. Other:								\$
9. Mileage	_____ miles @ \$.58/mile (no receipts required)							\$
*Mileage within 15 miles of the employee's usual work facility is not eligible for reimbursement								
10. TOTAL EXPENSES (Trip Total):								\$
11. Less Section 2 Advance Registration Payments								\$(
12. Less Procurement Card Charges:								\$(
13. Less Vendor Refunds								\$(
14. AMOUNT DUE TO (FROM) EMPLOYEE								\$

This is to certify that the above is a true and correct statement of travel expenses incurred in the conduct of City business. I have attached all supporting documentation (e.g., training brochure, airline receipt, etc.) and I acknowledge I may be personally responsible for any expenses I incurred for which I do not have supporting documentation (except for meals, mileage and transportation expenses of less than \$50 in a single transaction).

_____ Employee Signature	_____ Mayor:
_____ Supervisor Signature	_____ Department Director Signature
	_____ Finance:

Training/Travel Evaluation

(please complete and return within 30 days after training/travel)

Appendix B

Employee Name: _____

Today's Date: _____ Date(s) of Travel: _____

Source of Training (if seminar/conference): _____

1. What are the three greatest learnings that you took away from this training/travel? (Please attach documentation that may be beneficial to share with others.)
2. Describe two ways that you plan to apply what you learned during your training/travel to benefit your department and/or the City.

Training Program Only

3. This training course:
☐ Exceeded my expectations ☐ Met my expectations ☐ Did not meet my expectations
4. The instructor of the course:
☐ Exceeded my expectations ☐ Met my expectations ☐ Did not meet my expectations
5. Would you recommend this training class to others?
☐ Yes
☐ No

Please explain: _____

Explanation of Variances

Please explain variances of \$100 or more than the estimated costs (from Section 1):

Registration: _____

Lodging: _____

Airfare: _____

Meals: _____

Other: _____

RECRUITMENT STATUS REPORT

UPDATES THRU 07/11/19

STAFF PERSON	POSITION	DEPT.	Date of Vacancy	# of Openings	STATUS
KIM	Bus Driver	VT	Multiple	7	Testing 7/18/19. Panel interview 7/12/19. References and background pending on 3 candidates. Application deadline 7/28/19.
	Part-Time Bus Driver	VT	N/A	1	Testing 7/18/19. Panel Interview 7/17/19. Application deadline 7/28/19.
	Utility Worker – Part Time	VT	1/14/19	1	(Previous title: Service Person) Application deadline 7/14/19.
	Operations Supervisor	VT	5/18/19	1	Considering an additional candidate.
	Engineering Technician	DPW	4/3/19 & 5/29/19	2	Application deadline 7/28/19.
	Operator II – Water Construction	DPW	7/5/19	1	Determining panel interview date.
	Operator I - Street	DPW	6/28/19	1	Determining panel interview date.
	Recreation Programmer	PRFM	7/17/19	1	Application deadline 7/21/19.
ALLISON	Police Officer	Police	NA	Elig list	Conditional offer extended to two candidates. Physical Fitness testing 7/11/19 and 7/13/19.
	Emergency Management Coordinator	Health	6/5/19	1	Cassidy Walsh starting 8/7/19.

TOTAL POSITIONS OPEN = 16 TOTAL ELIGIBILITY LISTS = 1

POSITIONS ON HOLD

STAFF PERSON	POSITION	DEPT	Date(s) of Opening(s)	# of Openings	Person Vacating Position/Status
ALLISON	Systems Analyst	IT	7/6/15	1	Using part-time temporary staffing to fill current need.
	Administrative Support Specialist	Police	2/27/19	1	Department re-evaluating structure/responsibilities of this position.
KIM	Service Person	DPW	6/5/19	1	Resignation of Brandon Bukovic. Department proposing changes to position.

TOTAL POSITIONS ON HOLD = 3

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