

**COUNTY OF MILWAUKEE**  
**DAS - Department of Human Resources**  
INTER-OFFICE COMMUNICATION

---

DATE : December 3, 2009

To : Committee on Personnel

FROM : Karen R. Jackson, Ph.D., Director of Human Resources 

SUBJECT : **Informational Reports 12/14/2009**  
**For Personnel Committee Meeting**

Attached is an informational report listing ***appointments at an advanced step of the pay range***, which the Director of Human Resources intends to approve for implementation.

These reports are provided in accordance with the provisions of Chapter 17 of the County General Ordinances and may be included on the agenda of the December 14, 2009 Personnel Committee Meeting for informational purposes

In the event the Personnel Committee takes no action, the transactions noted on the reports will be implemented.

KRJ:bdv

Attachment

**Appointments At An Advanced Step Of The Pay Range  
Personnel Committee Report**

December 14, 2009

REQUESTOR	ORG UNIT	PREVIOUS	CURRENT CLASSIFICATION	PREVIOUS	CURRENT PAY GRADE	SALARY RANGE	STEPS IN PR	APPT STEP	REQUESTED	DIFFERENCE	CURRENT YEAR	JUSTIFICATION
		CLASSIFICATION		PAY GRADE				STEP AMOUNT	IN ANNUAL PAY	FISCAL IMPACT		
Sheriff	4039	New Hire	RN1	N/A	16N	\$47,049.60 - \$63,356.80	10	10	\$63,356.80	New Hire	\$675.00	TRG/EXP*
BHD	6443	New Hire	House Physician 1 HR	N/A	40XM	\$117,157.25 - \$144,015.87	7	4	\$129,894.13	New Hire	\$527.00	TRG/EXP*
Sheriff	4039	New Hire	House Physician 1 HR	N/A	40XM	\$117,157.25 - \$144,015.87	7	4	\$129,894.13	New Hire	\$527.00	TRG/EXP*
District Attorney	4501	New Hire	Clerical Assistant 1	N/A	03P	\$27,711.22 - \$35,535.76	9	3	\$29,667.04	New Hire	\$81.00	TRG/EXP*
Sheriff	4029	New Hire	Comm. & Highway Safety Dispatcher	N/A	15BZ	\$32,289.50 - \$39,886.70	9	2	\$33,049.33	New Hire	\$31.00	TRG/EXP*
Sheriff	4029	New Hire	Comm. & Highway Safety Dispatcher	N/A	15BZ	\$32,289.50 - \$39,886.70	9	2	\$33,049.33	New Hire	\$31.00	TRG/EXP*
Aging	7990	New Hire	Program Coordinator ASD	N/A	29M	\$53,962.48 - \$64,674.48	5	5	\$64,674.48	New Hire	\$444.00	TRG/EXP*
Airport	5041	Firefighter Equipment Oper	Airport Firefighter Training Officer	N/A	26M	\$49,218.42 - \$56,530.86	5	4	\$53,962.48	\$938.91	\$196.00	Same Dept Promotion
BHD	6363	Shift Supervisor	Nursing Program Coordinator	N/A	28MN	\$60,337.89 - \$78,398.53	10	8	\$73,023.81	\$3,336.74	\$525.00	Rehire

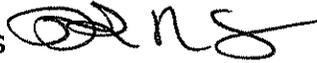
\*FISCAL IMPACT= (Step employee hired at - Step 1) \* Pay Periods Remaining in Year \* 1.0765

\*TRG/EXP Denotes Training and Experience

In accordance with the provisions of 17.09(3) of the County General Ordinances, the Director of Human Resources must file an informational report with all County Board Supervisors relative to all new appointments at an advanced step of the pay range.

**COUNTY OF MILWAUKEE**  
**DAS - Department of Human Resources**  
INTER-OFFICE COMMUNICATION

~REVISION II~

DATE : December 10, 2009  
To : Committee on Personnel  
FROM : Karen R. Jackson, Ph.D., Director of Human Resources   
SUBJECT : **Informational Reports 12/14/2009**  
**For Personnel Committee Meeting**

Attached are a series of informational reports relative to ***dual employment, temporary appointment, and emergency appointment.*** Reports reflect updates through the end of pay period 1. Also included is an informational report relative to ***temporary assignments to a higher classification,*** which is updated through December 14, 2009.

These reports are provided in accordance with the provisions of Chapter 17 of the County General Ordinances.

KRJ:bdv

Attachment

DUAL EMPLOYMENT REPORT  
PERSONNEL COMMITTEE MEETING  
DECEMBER 14, 2009

<u>Organizational Unit</u>	<u>Name</u>	<u>Current Classification</u>	<u>Current Pay Range</u>	<u>Dual Employment</u>	<u>Dual Employment Pay Range</u>
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Currently, there is no Dual Employment to report.

Temporary Appointment Reports  
Personnel Committee Meeting  
December 14, 2009

Requestor	Dept	Last Name	First Name	Title Code	Title Description	Emp Class	Status	# of Hours in Payroll Period	Temporary Appt Date	Appt Type
Airport - Maintenance - General	5051	Anders	Steven	32450	Airport Maintenance Wkr	F	A	80	10/26/2009	TA
		Brys	Richard	32450	Airport Maintenance Wkr	F	A	80	10/19/2009	TA
		Ellis	Tyrone	32450	Airport Maintenance Wkr	F	A	80	10/19/2009	TA
		Jackson	Willie	32450	Airport Maintenance Wkr	F	A	80	10/19/2009	TA
		Keil	Jason	32450	Airport Maintenance Wkr	F	A	80	10/19/2009	TA
		Mass	Salomon	32450	Airport Maintenance Wkr	F	A	80	10/19/2009	TA
		Melendez	Victor	32450	Airport Maintenance Wkr	F	A	80	10/19/2009	TA
		Sanders	Yvonne	32450	Airport Maintenance Wkr	F	A	80	11/2/2009	TA
		Skrobiszewski	Michael	32450	Airport Maintenance Wkr	F	A	80	10/26/2009	TA
		Slocum	Mark	32450	Airport Maintenance Wkr	F	A	80	10/19/2009	TA

Total Employees = 10

Highway Maintenance - Patrol Section One	5110	Bates	Gregory	32610	Highway Maintenance Wkr 1	F	A	80	11/2/2009	TA
		Brooks	David	32610	Highway Maintenance Wkr 1	F	A	80	11/9/2009	TA
		Brown	William	32610	Highway Maintenance Wkr 1	F	A	80	11/9/2009	TA
		Flanagan	Billy	32610	Highway Maintenance Wkr 1	F	A	80	11/2/2009	TA
		Hernandez-Morales	Roberto	32610	Highway Maintenance Wkr 1	F	A	80	11/2/2009	TA
		Jackson	Cortez	32610	Highway Maintenance Wkr 1	F	A	80	11/2/2009	TA
		Simmons	Tyrone	32610	Highway Maintenance Wkr 1	F	A	80	11/9/2009	TA

Total Employees = 7

Highway Maintenance - Patrol Section Two	5120	Blair	Joseph	32610	Highway Maintenance Wkr 1	F	A	80	11/2/2009	TA
		Hass	Terry	32610	Highway Maintenance Wkr 1	F	A	80	11/2/2009	TA
		Lukasik	Len	32630	Highway Maintenance Wkr 3	F	A	80	11/9/2009	TA
		Reinert	Mark	32610	Highway Maintenance Wkr 1	F	A	80	11/2/2009	TA
		Tersen	Douglas	32610	Highway Maintenance Wkr 1	F	A	80	11/9/2009	TA

Total Employees = 5

Highway Maintenance - Patrol Section Three	5160	Coats	Harlan	32610	Highway Maintenance Wkr 1	F	A	80	11/2/2009	TA
		Ehnert	Leonard	32630	Highway Maintenance Wkr 3	F	A	80	11/9/2009	TA
		Johnson	Dennis	32610	Highway Maintenance Wkr 1	F	A	80	11/9/2009	TA

Total Employees = 3

Highway Maintenance - Patrol Section Four	5140	Balderas	Juan	32610	Highway Maintenance Wkr 1	F	A	80	11/9/2009	TA
		Brandt	Richard	32610	Highway Maintenance Wkr 1	F	A	80	11/9/2009	TA
		Davis	Michael	32610	Highway Maintenance Wkr 1	F	A	80	11/2/2009	TA
		Gil	Joe	32610	Highway Maintenance Wkr 1	F	A	80	11/9/2009	TA
		Kowalski	Gregory	32610	Highway Maintenance Wkr 1	F	A	80	11/2/2009	TA
		Laack	Jerome	32610	Highway Maintenance Wkr 1	F	A	80	11/9/2009	TA
		Olsen	Peter	32610	Highway Maintenance Wkr 1	F	A	80	11/3/2009	TA
		Torgerson	Brian	32610	Highway Maintenance Wkr 1	F	A	80	11/2/2009	TA

Total Employees = 8

Grand Total of Employees: 33

Emergency Appointment Report  
Personnel Committee Meeting  
December 14, 2009

Requestor	Dept	Last Name	First Name	Title Description	Employee Class	Status	Emergency Appt Date	Pay Range
Sheriff's Office	4038	Cavadias	Pamela	Clerical Assistant 2	F	A	8/27/2009	04P

Total Employees = 1

Grand Total of Employees: 1

**Temporary Assignment to a Higher Classification (TAHC) Report  
Personnel Committee Meeting  
December 14, 2009**

~REVISION II~

<u>Dept</u>	<u>First Name</u>	<u>Last Name</u>	<u>Current Job Title</u>	<u>Pay Range</u>	<u>Start Date</u>	<u>Ext.</u>	<u>End Date</u>	<u>New Job Title</u>	<u>Pay Range</u>
Sheriff	Kevin	Nyklewicz	Sheriff Captain	915E	10/5/2009		1/3/2010	EXDIR 1 - SHERIFFDEPBURDIR	901E
Sheriff	Sylvia	Rodriguez	Deputy Sheriff Lieutenant	30M	10/5/2009		1/3/2010	Sheriff Department Captain	915E
Sheriff	Catherine	Trimboli	Deputy Sheriff I	17BZ	10/5/2009		1/3/2010	Deputy Sheriff Lieutenant	30M
Sheriff	Nancy	Evans	Corrections Manager	915E	10/10/2009		1/8/2010	Assistant Superintendent (Corr. Major)	902E
Sheriff	William	Brown	Deputy Sheriff Sergeant	22B	11/6/2009	*	2/3/2010	Deputy Sheriff Lieutenant	30M
Sheriff	James	Cox	Deputy Sheriff Sergeant	22B	11/6/2009	*	2/3/2010	Deputy Sheriff Lieutenant	30M
Sheriff	John	Nelson	Deputy Sheriff Sergeant	22B	11/6/2009	*	2/3/2010	Deputy Sheriff Lieutenant	30M
Sheriff	Scott	Stiff	Deputy Sheriff Sergeant	22B	11/6/2009	*	2/3/2010	Deputy Sheriff Lieutenant	30M
Sheriff	William	Duckert	Correction Officer Lieutenant	23CM	10/13/2009		1/11/2010	Corrections Captain	915E
Sheriff	Tinita	Holmes	Correction Officer 1	17Z	10/12/2009		1/10/2010	Corrections Officer Lieutenant	23CM
Sheriff	Steven	Immekus	Correction Officer 1	17Z	10/12/2009		1/10/2010	Corrections Officer Lieutenant	23CM
Sheriff	Damon	Key	Correction Officer 1	17Z	10/12/2009		1/10/2010	Corrections Officer Lieutenant	23CM
Sheriff	Michael	Mallon	Correction Officer 1	17Z	10/12/2009		1/10/2010	Corrections Officer Lieutenant	23CM
Sheriff	David	Rugaber	Correction Officer 1	17Z	10/12/2009		1/10/2010	Corrections Officer Lieutenant	23CM
Sheriff	Ferdinand	Torres	Correction Officer 1	17Z	10/12/2009		1/10/2010	Corrections Officer Lieutenant	23CM
Sheriff	Kathleen	Sullivan	Correction Officer 1	14Z	11/1/2009		1/29/2010	Correction Officer Lieutenant	23CM
Sheriff	Kerry	Turner	Correction Officer 1	14Z	11/1/2009		1/29/2010	Correction Officer Lieutenant	23CM
Parks	Valdemereia	McCollum	Community Center Supervisor	15	10/10/2009		12/30/2009	Community Center Manager	22M
CSE	John	O'Shea	Legal Consl Child Supp Supervisor	38M	10/26/2009	*	1/23/2010	Legal Cnsl Child Support 2	34EM
CSE	Michelle	Wagner	Paralegal-Specialist CSE	22	10/26/2009	*	1/23/2010	Child Support Supervisor	24M
CSE	Edith	Moton	Child Support Coordinator	22M	10/26/2009		1/23/2010	Child Support Supervisor	24M
CSE	Cynthia	Patl	Capital Finance Plan Analyst 3	33JM	11/30/2009		2/27/2010	Family Support Manager	916E
CSE	Janet	Neison	Legal Counsel Child Supp 2	34EM	10/11/2009	*	1/9/2010	Exdir3 Child Support Enforcement	903E
DHHS	Debra	Turner	Economic Support Specialist	11Z	9/29/2009		12/27/2009	Economic Support Supervisor 1	18M
DHHS - MPSM	Mildred	Brown-Pritzi	Clerical Assistant 2	04P	10/28/2009		12/25/2009	Operations Coordinator SP	22M
DTPW	David	Schaning	Asst. Dir. Facilities Management	54	10/6/2009		1/4/2010	Exec. Director Facilities Management	902E
DTPW	Jack	Takerian	Director Facilities Management	902E	10/4/2009	*	1/2/2010	Director of Trans & Public Works	903E
DTPW-Transp	David	Karnes	Engineer	32A	9/28/2009		12/25/2009	Resident Contract Mgr - Traffic	916E
DTPW-Admin	Claudia	Coleman-Brown	Secretarial Assistant	4PM	11/10/2009	*	2/8/2010	Sr. Executive Assistant - DTPW	7PM
DTPW-Airport	Jerome	Peterson	Heating & Ventilation Mechanic 2	16	10/17/2009		1/14/2010	Operating & Maintenance Supervisor	25M
DTPW-Airport	Holly	Ricks	Administrative Assistant 3 Airport	25	11/16/2009		12/30/2009	Asst. Airport Operations Manager	28M
DTPW-Airport	Kevin	Doyne	Fire Fighter Equipment Operator	17B	11/23/2009		2/21/2010	Assistant Airport Fire Chief	27M
DTPW-Airport	John	Moore	Ground Transp Parking Manager	30M	11/16/2009		12/30/2009	Airport Operations Manager Landside	34N
DHHS - ESD	Nadayne	Pagan-Vera	Childcare Program Spec B/L SP	20	9/28/2009		12/26/2009	Administrative Coordinator ESSB	27M
DHHS	Lisa	Marks	Exdir3 Child Support Enforcement	903E	10/11/2009	*	1/9/2010	Exdir3 Director of Human Services	903E
DAS - ERS	Yerkes	Dale	Fiscal Officer Assistant	29M	11/1/2009		1/29/2010	Fiscal Officer - ERS	32M

\*Pursuant to M.C.G.O. 17.085(1), (2), or (7), the TAHC has been extended by the Director of DHR. The County Board of Supervisors and the County Executive must approve the second extension to a vacant *unclassified* position through adoption of a Resolution.

Finance  
Personnel 4  
DEC 2009

**COUNTY OF MILWAUKEE**  
Interoffice Memorandum

DATE: December 4, 2009

FILE NO. 09-257(a)(a)

TO: Supervisor Lee Holloway, Chairman, Milwaukee County Board of Supervisors

FROM: Jerome J. Heer, Director of Audits  
Steve Cady, County Board Fiscal & Budget Analyst

SUBJECT: **TECHNICAL CORRECTION TO COUNTY ORDINANCE 17.16(1)(b) TO CLEARLY DEFINE OVERTIME FOR NON-REPRESENTED EMPLOYEES EXEMPT FROM THE FAIR LABOR STANDARDS ACT (FILE NO. 09-257(a))**

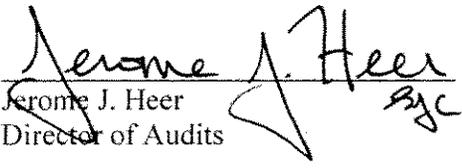
**ISSUE**

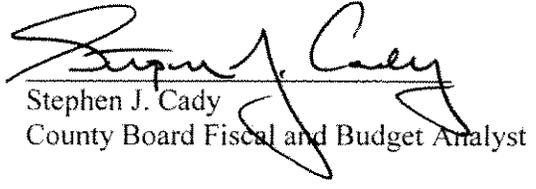
At its meeting on November 5, 2009, the County Board of Supervisors approved a modification to Milwaukee County General Ordinance 17.16(1)(b) that revised overtime provisions for non-represented employees who are exempt from the Fair Labor Standards Act (File No. 09-257, approved 17-2). While the legislative intent of the changes is clear, the approved ordinance inadvertently omitted the precise definition of "overtime."

**RECOMMENDATION**

In order to clearly define "overtime" for purposes of non-represented employees exempt from the Fair Labors Standards Act, it is recommended that the following language be added to the ordinance revision approved last month: "for all hours worked in excess of (40) hours in a week."

The attached resolution/ordinance effectuating this change is recommended for approval.

  
Jerome J. Heer  
Director of Audits

  
Stephen J. Cady  
County Board Fiscal and Budget Analyst

cc: Supervisor Elizabeth Coggs, Chairwoman, Committee on Finance and Audit  
Supervisor Paul Cesarz, Chairman, Committee on Personnel  
County Executive Scott Walker  
Cynthia Archer, Director, DAS

Steven Kreklow, Fiscal and Budget Administrator, DAS  
Scott Manske, Controller, DAS  
Dee Hervey, Chief Committee Clerk, County Board

1  
2  
3  
4 (ITEM NO. ) From the Director of Audits and County Board Fiscal and Budget Analyst  
5 recommending adoption of a technical amendment to Chapter 17.16(1)(b) of the  
6 Milwaukee County Code of General Ordinances regarding overtime compensation to  
7 clearly define "overtime" for non-represented employees exempt from the Fair Labor  
8 Standards Act, by recommending adoption of the following:

9  
10 **A RESOLUTION/ORDINANCE**

11  
12 WHEREAS, Section 17.16 of the Milwaukee County Code provides for overtime  
13 compensation to non-represented employees; and

14  
15 WHEREAS, the County Board, at its meeting on November 5, 2009, approved  
16 modifications to Section 17.16(1)(b) (Vote 17-2) that reduced overtime compensation for  
17 non-represented employees; and

18  
19 WHEREAS, after additional review, it was determined that the definition of  
20 "overtime" may not be clear for Fair Labor Standards Act (FLSA) exempt employees who  
21 are not in an executive classification; and

22  
23 WHEREAS, to bring clarity and define the original legislative intent, a technical  
24 amendment to add "for all hours worked in excess of (40) hours in a week" to the recently  
25 modified ordinance is in order; now, therefore,

26  
27 BE IT RESOLVED, that the Milwaukee County Board of Supervisors does hereby  
28 approve the following:

29  
30 **AN ORDINANCE**

31  
32 To amend County Ordinances regarding overtime compensation for certain non-  
33 represented employees.

34  
35 The County Board of Supervisors of the County of Milwaukee does ordain as  
36 follows:

37  
38 **SECTION 1.** Section 17.16 (1)(b) is hereby amended, as follows:

39  
40 17.16 (1)(b) Employees who are not represented by a collective bargaining unit shall be  
41 compensated for overtime as follows: employees holding positions which are non-exempt  
42 from the Fair Labor Standards Act shall receive time and one-half for all hours worked over  
43 forty (40) hours per week regardless of the pay range to which the position held is assigned.  
44 Employees holding a position exempt from the Fair Labor Standards Act who are not in an  
45 executive classification shall be compensated for overtime for all hours worked in excess of

46 (40) hours in a week on a straight time basis and may only liquidate accrued overtime as  
47 compensatory time off unless approved by the DAS Director of Human Resources who  
48 shall also provide the Personnel Committee with quarterly reports of all overtime that is  
49 paid rather than used as compensatory time off.

## MILWAUKEE COUNTY FISCAL NOTE FORM

DATE: December 3, 2009

Original Fiscal Note

Substitute Fiscal Note

**SUBJECT:** A technical amendment to Chapter 17.16(1)(b) of the Milwaukee County Code of General Ordinances regarding overtime compensation to clearly define "overtime" for non-represented employees exempt from the Fair Labor Standards Act.

**FISCAL EFFECT:**

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> No Direct County Fiscal Impact<br><input type="checkbox"/> Existing Staff Time Required<br><input type="checkbox"/> Increase Operating Expenditures<br>(If checked, check one of two boxes below)<br><input type="checkbox"/> Absorbed Within Agency's Budget<br><input type="checkbox"/> Not Absorbed Within Agency's Budget<br><input type="checkbox"/> Decrease Operating Expenditures<br><input type="checkbox"/> Increase Operating Revenues<br><input type="checkbox"/> Decrease Operating Revenues | <input type="checkbox"/> Increase Capital Expenditures<br><input type="checkbox"/> Decrease Capital Expenditures<br><input type="checkbox"/> Increase Capital Revenues<br><input type="checkbox"/> Decrease Capital Revenues<br><input type="checkbox"/> Use of contingent funds |
|---|--|

*Indicate below the dollar change from budget for any submission that is projected to result in increased/decreased expenditures or revenues in the current year.*

	Expenditure or Revenue Category	Current Year	Subsequent Year
<b>Operating Budget</b>	Expenditure	0	0
	Revenue	0	0
	Net Cost	0	0
<b>Capital Improvement Budget</b>	Expenditure	0	0
	Revenue	0	0
	Net Cost	0	0

**DESCRIPTION OF FISCAL EFFECT**

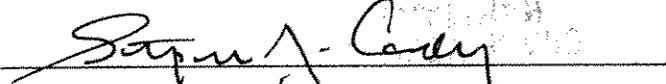
In the space below, you must provide the following information. Attach additional pages if necessary.

- A. Briefly describe the nature of the action that is being requested or proposed, and the new or changed conditions that would occur if the request or proposal were adopted.
- B. State the direct costs, savings or anticipated revenues associated with the requested or proposed action in the current budget year and how those were calculated.<sup>1</sup> If annualized or subsequent year fiscal impacts are substantially different from current year impacts, then those shall be stated as well. In addition, cite any one-time costs associated with the action, the source of any new or additional revenues (e.g. State, Federal, user fee or private donation), the use of contingent funds, and/or the use of budgeted appropriations due to surpluses or change in purpose required to fund the requested action.
- C. Discuss the budgetary impacts associated with the proposed action in the current year. A statement that sufficient funds are budgeted should be justified with information regarding the amount of budgeted appropriations in the relevant account and whether that amount is sufficient to offset the cost of the requested action. If relevant, discussion of budgetary impacts in subsequent years also shall be discussed. Subsequent year fiscal impacts shall be noted for the entire period in which the requested or proposed action would be implemented when it is reasonable to do so (i.e. a five-year lease agreement shall specify the costs/savings for each of the five years in question). Otherwise, impacts associated with the existing and subsequent budget years should be cited.
- D. Describe any assumptions or interpretations that were utilized to provide the information on this form.

Approval of this resolution/ordinance will provide a technical clarification to the ordinance revision approved on November 5, 2009 to Section 17.16(1)(b) relating to overtime compensation for non-represented employees.

This revision will help clarify the definition of overtime and will not result in the expenditure of additional tax levy.

Department/Prepared By Steve Cady, Fiscal and Budget Analyst, County Board

Authorized Signature 

Did DAS-Fiscal Staff Review?  Yes  No

<sup>1</sup> If it is assumed that there is no fiscal impact associated with the requested action, then an explanatory statement that justifies that conclusion shall be provided. If precise impacts cannot be calculated, then an estimate or range should be provided.

1 By Supervisors Larson and Dimitrijevic

2 File No. 09-415

3 **AN AMENDED RESOLUTION**

4 WHEREAS, at the September 11, 2009 meeting of the Committee on  
5 Personnel, Committee members were informed that the State of Wisconsin  
6 expanded eligibility for the state government employee health plans to provide  
7 coverage for domestic partners as part of the 2009-2011 biennial budget  
8 (Wisconsin Act 28); and

9 WHEREAS, also as part of Act 28, the State of Wisconsin adopted Chapter  
10 770 of the state statutes, providing a process by which same sex couples can apply  
11 for and receive a declaration of domestic partnership through the office of the  
12 County Clerk; and

13 WHEREAS, since August 3, 2009, the first day that County Clerks were  
14 authorized to issue declarations of domestic partnership, the Milwaukee County  
15 Clerk has issued approximately 170 such declarations; and

16 WHEREAS, for purposes of health benefit eligibility, the State's definition of  
17 domestic partnership does not discern between same-sex and opposite-sex  
18 couples (Wis. Stats. 40.02(21d)) but instead provides a definition for non-married  
19 domestic partners as follows:

20 **40.02(21d)** "Domestic partnership" means a relationship between  
21 two individuals that satisfies all of the following:

- 22 (a) Each individual is at least 18 years old and otherwise competent  
23 to enter into a contract  
24 (b) Neither individual is married to, or in a domestic partnership  
25 with, another individual  
26 (c) The 2 individuals are not related by blood in any way that  
27 would prohibit marriage under s. 765.03  
28 (d) The 2 individuals consider themselves to be members of  
29 each other's immediate family  
30 (e) The 2 individuals agree to be responsible for each other's  
31 basic living expenses  
32 (f) The 2 individuals share a common residence. Two individuals  
33 may share a common residence even if any of the following  
34 applies:  
35 1. Only one of the individuals has legal ownership of the residence  
36 2. One or both of the individuals have one or more additional  
37 residences not shared with the other individual  
38 3. One of the individuals leaves the common residence with  
39 the intent to return

40 ; and

41. WHEREAS, according to a Human Rights Campaign database, there are  
42 616 different municipal or county governments or school districts, and 20 states,  
43 that provide domestic partner health benefits for their employees; and

44 WHEREAS, although domestic partnership and marriage serve different  
45 purposes for people in different situations, people in all situations need equal  
46 access to affordable health insurance and other employment benefits; and

47 WHEREAS, a study by UCLA's Williams Institute found that "employers'  
48 health insurance coverage for legal spouses places unmarried couples at a  
49 disadvantage for obtaining coverage.... [P]eople with same-sex or different-sex  
50 unmarried partners are two to three times more likely to be uninsured than  
51 married people, even after controlling for factors influencing coverage"; and

52 WHEREAS, it is unknown how many current Milwaukee County employees  
53 may be in domestic situations that would qualify as a domestic partnership (as  
54 defined by state law), although experience on the national level indicates  
55 approximately 1-3 per cent of employees include domestic partners when allowed  
56 under the employer's health plan; and

57 WHEREAS, although the fiscal impact of the proposed change may be  
58 sketched based on an expected participation rate, a thorough fiscal review will  
59 necessary to determine the best possible fiscal estimate; and

60 WHEREAS, there may be other legal or operational considerations that  
61 should be reviewed and evaluated prior to extending health benefits to domestic  
62 partners; now, therefore

63 BE IT RESOLVED, that the Director, Department of Administrative Services –  
64 Division of Employee Benefits, is authorized and directed to work with the Office of  
65 Corporation Counsel, Department of Audit and County Board staff to draft revisions  
66 to the Milwaukee County Employee Health Plan to extend health benefit coverage  
67 to domestic partners of eligible Milwaukee County employees, and submit a final  
68 plan to the Committees on Personnel and Finance and Audit no later than July 1,  
69 2010.

COUNTY OF MILWAUKEE  
DAS - Department of Human Resources  
INTER-OFFICE COMMUNICATION

**DATE** : December 3, 2009  
**To** : Committee on Personnel  
**FROM** : Karen R. Jackson, Ph.D., Director of Human Resources   
**SUBJECT** : **Informational Report for 12/14/2009  
Personnel Committee Meeting**

Attached are a series of informational reports listing various personnel transactions that the Director of Human Resources intends to approve for implementation.

These reports (*reclassifications, advancements within the pay range, reallocations, and revisions to ECP*) are provided in accordance with the provisions of Chapter 17 and may be included on the agenda of the December 14, 2009 Personnel Committee Meeting for informational purposes.

In the event the Personnel Committee takes no action, the transactions noted on the reports will be implemented.

KRJ:bdv

Copy: HR Managers

Personnel Committee Meeting Date: December 14, 2009

### Reclassification Report

In accordance with the provisions of 17.05 of the Milwaukee County General Ordinances, the Director of Human Resources intends to reclassify the position noted below. The Department of Administration has verified that funds are available within the adopted budget to cover the cost associated with this action.

Requestor	Org	Position	Current Classification (Title)	Current Pay range	Proposed Classification Title)	Proposed Pay range	Current Year Impact (Top Step)	Annual Year Impact	Reason
IMSD	1164	65561	Applications Specialist IV	28D	Business Analyst IV	28D	\$0	\$0	Changes in Duties
IMSD	1164	65561	Applications Specialist IV	28D	Network Applications Specialist IV	28D	\$0	\$0	Changes in Duties
IMSD	1164	65561	Applications Specialist IV	28D	Network Applications Specialist IV	28D	\$0	\$0	Changes in Duties
<b>TOTAL</b>							<u>\$0</u>	<u>\$0</u>	

Personnel Committee Date: December 14, 2009

### ADVANCEMENT WITHIN THE PAY RANGE REPORT

In accordance with the provisions of 17.10 of the County General Ordinances, the Director of Human Resources intends to approve the advancement within the pay range for the positions noted below. The Department of Administration has verified that funds are available within the adopted budget to cover the cost associated with these actions.

<u>REQUESTOR</u>	<u>DEPT ORG UNIT</u>	<u>TITLE CODE NO POS</u>	<u>CURRENT CLASSIFICATION AND PAY RANGE</u>	<u>CURR YEAR</u>	<u>SUB YEAR</u>	<u>REASON</u>
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Currently, there is no "Advancement Within the Pay Range" to report.

Personnel Committee Date: December 14, 2009

### REALLOCATION REPORT

In accordance with the provisions of 17.055 of the County General Ordinances, the Director of Human Resources intends to reallocate the positions noted below. The Department of Administration has verified that funds are available within the adopted budget to cover the cost associated with these actions. Fiscal note only reflects costs of wages and social security.

<u>DEPT</u>	<u>DEPT</u> <u>ORG</u>	<u>TITLE</u> <u>CODE</u>	<u>AUTH</u> <u>POS</u>	<u>FILLED</u> <u>POS</u>	<u>CURRENT CLASSIFICATION</u>	<u>CURRENT</u> <u>PAY RANGE</u>	<u>RECOMMENDED</u> <u>PAY RANGE</u>	<u>CURR</u> <u>YEAR</u>	<u>SUB YEAR</u>	<u>MAX YEAR</u>	<u>REASON</u>
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No Reallocations this Period

**REVISIONS TO ECP REPORT  
Personnel Committee Meeting  
December 14, 2009**

Currently, there are no "Revisions to ECP" to report.



Personnel  
Pension Study  
Com  
Pension Ba  
Journal,  
Finance & Audit  
File No. 09-

1 From the Director, Department of Administrative Services  
2

3 A RESOLUTION FILE NO. 09-471

4 To amend various sections of the Milwaukee County Code of General  
5 Ordinances as it pertains to wage, health and pension benefits for non-represented  
6 employees.

7 WHEREAS, due to the extraordinary fiscal environment confronting  
8 Milwaukee County, the 2010 Adopted Budget anticipates significant expenditure  
9 reductions and controls to be achieved through wage, health and pension benefit  
10 modifications for all employees; and

11 WHEREAS, adopted as part of Org. Unit 1972 – Wage and Benefit  
12 Modifications, several wage, health and pension modifications require adoption of  
13 the attached conforming ordinances to effectuate those adopted changes for all  
14 employees not represented by a collective bargaining agreement, including:

- 15 1. An increase in the normal retirement age for new members of the  
16 Employee Retirement System (ERS) from age 60 to age 64,
- 17 2. A reduction in the annual pension service credit multiplier for  
18 members of the ERS for all future years from 2.0% to 1.6%,
- 19 3. The elimination of incremental wage and salary advancements for  
20 calendar year 2010, and
- 21 4. Increases in employee premium contributions and certain co-pay  
22 and deductible amounts under the Milwaukee County Group Health  
23 Benefit Plan

24 ;and

25 WHEREAS, while these wage, health and pension benefit modifications will  
26 initially be applied only to non-represented employees, the modifications are  
27 expected to be included in the County's proposals during the collective bargaining  
28 process in order to extend these benefits to employees who are represented by a  
29 collective bargaining unit; and

30 WHEREAS, in order to respond to the extraordinary present and structural  
31 fiscal condition of Milwaukee County, non-represented employees are assigned the  
32 responsibility of sacrificing certain benefits with no assurance that all represented  
33 employees will follow their lead; and

34 WHEREAS, it is not unreasonable to expect certain employees to absorb a  
35 temporary wage freeze or increases in health care contributions, as wage and health

36 packages are frequently modified through collective bargaining, however it would  
37 establish an untenable benefit structure if one class of non-protective employee has  
38 a pension benefit that significantly differs from that of a majority of other County  
39 employees; and

40 WHEREAS, it is appropriate to make the attached proposed pension  
41 modifications conditional on acceptance, either through settlement agreement or  
42 arbitration decision, by a majority of Milwaukee County's employees who are  
43 represented by a collective bargaining agreement; and

44 WHEREAS, pursuant to Section 201.24(8.17) of the MCGO, the proposed  
45 changes to Section 201.24 of the MCGO have been referred to the Pension Board  
46 for comment; and

47 WHEREAS, the proposed changes to Section 201.24 of the MCGO have  
48 been referred to the pension fund actuary whose actuarial analysis indicates the  
49 changes will decrease the accrued liability and the normal actuarial cost; and

50 WHEREAS, the Pension Study Commission reviewed the pension fund  
51 actuary's report on \_\_\_\_\_, 2009 and has recommended the County Board adopt  
52 the proposed changes to Section 201.24 of the MCGO (Vote X-X); now therefore,

53 BE IT RESOLVED, that the Milwaukee County Board of Supervisors hereby  
54 amends Sections 17.10, 17.14, and 201.24 of the Milwaukee County Code of  
55 General Ordinances by adopting the following,

56 **AN ORDINANCE**

57 The County Board of Supervisors of the County of Milwaukee does ordain as  
58 follows:

59 **SECTION 1.** Section 17.10 of the General Ordinances of Milwaukee County is  
60 amended as follows:

61 **17.10. Advancement within a pay range.**

62 The incumbent of a position shall be advanced to the next highest rate of pay in the  
63 pay range provided for the classification only upon meritorious completion of two  
64 thousand eighty (2,080) straight time hours paid. Deviation from this requirement is  
65 permissible under the following conditions:

66 (1) A department head may permit an employee to be advanced one (1) additional  
67 step in the range if advancement to the next highest rate above the rate originally  
68 received results in a pay increase of less than twenty-one cents (\$0.21) per hour.

69 (2) The director of human resources may approve the request of any department  
70 head to advance a promoted employee or incumbent of a reclassified position

71 one (1) additional step in the range if the employee would have advanced in the  
72 classification from which they were promoted to the same rate of pay within  
73 ninety (90) days of the promotion. The decision of the director may be appealed  
74 to the committee on personnel within thirty (30) days of notice. The decision of  
75 the county board on the committee recommendation, subject to review by the  
76 county executive, shall be final.

77 (3) Department heads:

78 (a) Who have adopted the annual performance appraisal system revised in 1986  
79 and approved by the director of human resources may advance an employee  
80 who has exhibited exemplary performance up to two (2) steps in the pay  
81 range providing the director has verified that the performance evaluation  
82 system has been implemented in the appropriate manner. Such  
83 advancements shall be implemented in accordance with subsection (4) of  
84 this section.

85 (b) May request an advancement in the pay range for an employee who holds a  
86 position which is critical to the operation of their department if the request is  
87 necessary to retain the employee in county service. The request may be  
88 implemented upon approval of the director, in accordance with subsection  
89 (4) of this section.

90 (c) In subsections (a) and (b) above the decision of the director of human  
91 resources may be appealed to the committee on personnel within thirty (30)  
92 days of notice. The decision of the county board on the committee's  
93 recommendation, subject to review by the county executive, shall be final  
94 and shall be implemented the first day of the first pay period following  
95 review by the county executive, or in the event of a veto, final county board  
96 action.

97 (4) Monthly while any advancements within a pay range requested by departments,  
98 pursuant to subsections (3)(a) and (3)(b) are pending, the director of human  
99 resources shall provide a report to the committee on personnel which lists all  
100 such advancements which the director intends to approve, along with a fiscal  
101 note for each. This report shall be distributed to all county supervisors and  
102 placed on the committee agenda for informational purposes. If a county  
103 supervisor objects to the decision of the director within seven (7) working days  
104 of receiving this report the advancement shall be held in abeyance until resolved  
105 by the county board, upon recommendation of the committee, and subsequent  
106 county executive action. If no county supervisor objects, the advancement shall  
107 be implemented the first day of the first pay period following the meeting of the  
108 committee. In the event the county board takes no action on an advancement,  
109 after receipt of a recommendation from the committee, the advancement shall

110 be implemented the first day of the first pay period following action by the  
111 county executive or, in the event of a veto, final county board action.

112 (5) From January 1, 2010 through December 31, 2010, notwithstanding any other  
113 provisions of this code, incumbents of a position not represented by a collective  
114 bargaining unit who would have received an advance in the pay range upon the  
115 meritorious completion of two-thousand eighty (2,080) hours, shall be advanced  
116 to the next highest rate of pay in the pay range provided for the classification  
117 only upon meritorious completion of an additional two-thousand eighty (2,080)  
118 straight time hours for full-time positions, and a prorated fraction thereof for  
119 employees whose scheduled work week is less than 40 hours. The intent of this  
120 section is to temporarily suspend incremental salary advancements for non-  
121 represented employees for 2010, consistent with the terms of the 2010 Adopted  
122 Budget.

123 **SECTION 2.** Section 17.14(7) of the General Ordinances of Milwaukee County,  
124 specifically as it pertains to employee premium contributions and certain co-pay and  
125 deductible amounts, is amended as follows:  
126

127 **17.14(7) Milwaukee County Group Health Benefit Program.**

128 ...

129 (d) Eligible employees enrolled in the PPO or HMO shall pay a monthly  
130 amount toward the monthly cost of health insurance as described below:

131 (1) Effective January ~~2009~~ 2010 employees enrolled in the HMO comparable  
132 plan shall pay ~~thirty five dollars (\$35.00)~~ fifty dollars (\$50.00) per month  
133 toward the monthly cost of a single plan and ~~seventy dollars (\$70.00)~~ one  
134 hundred dollars (\$100.00) per month toward the monthly cost of a family  
135 plan.

136 (2) Effective January ~~2009~~ 2010 employees enrolled in the PPO comparable  
137 plan shall pay ~~seventy five dollars (\$75.00)~~ ninety dollars (\$90.00) per  
138 month toward the monthly cost of a single plan and ~~one hundred fifty~~  
139 ~~dollars (\$150.00)~~ one hundred eighty dollars (\$180.00) per month toward  
140 the monthly cost of a family plan.

141 (3) The appropriate payment shall be made through payroll deductions.  
142 When there are not enough net earnings to cover such a required  
143 contribution, and the employee remains eligible to participate in a health  
144 care plan, the employee must make the payment due within ten (10)  
145 working days of the pay date such a contribution would have been  
146 deducted. Failure to make such a payment will cause the insurance  
147 coverage to be canceled effective the first of the month for which the  
148 premium has not been paid.

149 (4) The county shall deduct employees' contributions to health insurance on  
150 a pre-tax basis pursuant to a section 125 plan.

151 (5) The county shall establish and administer flexible spending accounts  
152 (FSA's) for those employees who desire to pre-fund their health insurance  
153 costs as governed by IRS regulations. The county retains the right to select  
154 a third party administrator.

155 ...

156 (n) All eligible employees enrolled in the PPO shall have a deductible equal to  
157 the following:

158 (1) The in-network deductible shall be ~~one hundred fifty dollars (\$150.00)~~  
159 two hundred fifty dollars (\$250.00) per insured, per calendar year; ~~four~~  
160 hundred fifty dollars (\$450.00) seven hundred fifty dollars (\$750.00) per  
161 family, per calendar year.

162 (2) The out-of-network deductible shall be ~~four hundred dollars (\$400.00)~~  
163 five hundred dollars (\$500.00) per insured, per calendar year; ~~one~~  
164 thousand two hundred dollars (\$1,200.00) one thousand five hundred  
165 dollars (\$1,500.00) per family, per calendar year.

166 ...

167 (p) All eligible employees and/or their dependents enrolled in the PPO shall be  
168 subject to a co-insurance co-payment after application of the deductible  
169 and/or office visit co-payment.

170 (1) The in-network co-insurance co-payment shall be equal to ten (10)  
171 percent of all charges subject to the applicable out-of-pocket maximum.

172 (2) The out-of-network co-insurance co-payment shall be equal to ~~twenty (20)~~  
173 thirty (30) percent of all charges subject to the applicable out-of-pocket  
174 maximum.

175 (q) All eligible employees enrolled in the PPO shall be subject to the following  
176 out-of-pocket expenses including any applicable deductible and percent co-  
177 payments to a calendar year maximum of:

178 (1) ~~One thousand five hundred dollars (\$1,500.00)~~ Two thousand dollars  
179 (\$2,000.00) in-network under a single plan.

180 (2) ~~Two thousand five hundred dollars (\$2,500.00)~~ Three thousand five  
181 hundred dollars (\$3,500.00) in-network under a family plan.

182 (3) ~~Three thousand dollars (\$3,000.00)~~ Three thousand five hundred dollars  
183 (\$3,500.00) out-of-network under a single plan.

184 (4) ~~Five thousand dollars (\$5,000.00)~~ Six thousand dollars (\$6,000.00) out-of-  
185 network under a family plan.

186 (5) Office visit co-payments are not limited and do not count toward the  
187 calendar year out-of-pocket maximum(s).

188 (6) Charges that are over usual and customary do not count toward the  
189 calendar year out-of-pocket maximum(s).

190 (7) Prescription drug co-payments do not count toward the calendar year out-  
191 of-pocket maximum(s).

192 (8) Other medical benefits not described in (q) (5), (6), and (7) shall be paid  
193 by the health plan at one hundred (100) percent after the calendar year  
194 out-of-pocket maximum(s) has been satisfied.

195 (r) All eligible employees and/or their dependents enrolled in the PPO shall pay a  
196 ~~fifty dollar (\$50.00)~~ one hundred dollar (\$100.00) emergency room co-  
197 payment in-network or out-of-network. The co-payment shall be waived if  
198 the employe and/or their dependents are admitted directly to the hospital  
199 from the emergency room. In-network and out-of-network deductibles and  
200 co-insurance percentages apply.

201 ...

202 (w) All eligible employees and/or their dependents enrolled in the HMO shall pay  
203 a ~~fifty dollar (\$50.00)~~ one hundred dollar (\$100.00) emergency room co-  
204 payment (facility only). The co-payment shall be waived if the employe  
205 and/or their dependents are admitted to the hospital directly from the  
206 emergency room.

207 **SECTION 3.** Section 201.24(2.18) of the General Ordinances of Milwaukee County  
208 is amended as follows:

209 **2.18. Normal retirement age.**

210 Normal retirement age shall be age fifty-seven (57) for deputy sheriffs. Normal  
211 retirement age for a member (a) who is not covered by a collective bargaining  
212 agreement at the time his employment terminates; (b) who is not an elected official  
213 at the time his employment terminates; and (c) whose initial membership in the  
214 retirement system began on or after January 1, 2010 shall be age sixty-four (64). For  
215 all other members, normal retirement age shall be age and sixty (60). for all other  
216 members.

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**SECTION 4.** Section 201.24 (4.1) of the General Ordinances of Milwaukee County is amended as follows:

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**4.1 Normal retirement.**

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(1) A member shall be eligible for a normal pension if his employment is terminated on or after he has attained age fifty-five (55) and has completed thirty (30) years of service, or if his employment is terminated on or after he has attained normal retirement age as defined in section 2.18, sixty (60); Deputy sheriffs shall be eligible to retire at age fifty-seven (57) regardless of their number of years of service or at age fifty-five (55) with at least fifteen (15) years of creditable pension service.

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(2) A member who is not covered by the terms of a collective bargaining agreement at the time his employment is terminated and whose initial membership in the retirement system under chapter 201.24 began prior to January 1, 2006, retires on and after September 1, 1993, shall be eligible for a normal pension when the age of the member when added to his years of service equals seventy-five (75), but this provision shall not apply to any member eligible under section 4.5 nor to any non-represented deputy sheriff who was hired as a deputy sheriff after December 31, 1993 and whose appointment to a non-represented position was first effective after June 30, 2009.

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**SECTION 5.** Section 201.24 (4.5) of the General Ordinances of Milwaukee County is amended as follows:

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**4.5. Deferred vested retirement.**

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(1) A member shall be eligible for a deferred vested pension if his employment is terminated for any cause, other than fault or delinquency on his part, provided that he elects not to withdraw any part of his membership account and that his pension when he qualifies for at his normal retirement as defined in section 4.1 date age sixty (60) is at least ten dollars (\$10.00) per month.

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(2) Notwithstanding the foregoing provisions of this section 4.5, any member whose last period of continuous membership began on or after January 1, 1971, but prior to January 1, 1982, shall not be eligible for a deferred vested pension if his employment is terminated prior to his completion of six (6) years of service. Also, notwithstanding the foregoing provisions of this section 4.5 any member who first became a member of the system on and after January 1, 1982, shall not be eligible for a deferred vested pension if his employment is terminated prior to his completion of ten (10) years of service.

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(3) Notwithstanding the foregoing provisions of this section, any non-represented Doyne employe who was a member of the employe's retirement system and any

255 member who was represented by the Federation of Nurses & Health  
256 Professionals when they voluntarily resigned their employment between  
257 September 1, 1995, and December 31, 1995, at the time of, and in lieu of, a  
258 layoff from county service as a direct result of the sale/lease of John L. Doyne  
259 Hospital and employes of the School of Nursing who resign from county service  
260 in lieu of being laid off due to the closure of the School of Nursing who left  
261 county service with seven (7) or more years of service shall be vested for a  
262 deferred vested pension.

263 (4) Payment of a deferred vested pension shall commence as of the member's  
264 normal retirement date, but in no event until timely application for the deferred  
265 vested pension is filed with the board. However, if a member has at least fifteen  
266 (15) years of service, he may request the board to authorize commencement of  
267 his deferred vested pension as of his 55th birthday, or as of any date after his  
268 55th birthday, which precedes his normal retirement date, and if the board  
269 consents thereto, his pension shall commence as of the date so requested but the  
270 amount thereof shall be reduced as provided in section 5.5. The last payment  
271 shall be made as of the date of death of the retired member.

272 **SECTION 6.** Section 201.24 (5.1) of the General Ordinances of Milwaukee County,  
273 is amended as follows:

274 **5.1. Normal pension.**

275 (1) A member, other than a member covered by the terms of a collective bargaining  
276 agreement, a deputy sheriff or elected official, whose continuous membership  
277 began prior to January 1, 1982 who meets the requirements for a normal  
278 pension shall receive an amount equal to two (2) percent of his final average  
279 salary multiplied by the number of his years of service rendered prior to January  
280 1, 2010, other than as a member covered by the terms of a collective bargaining  
281 agreement, a deputy sheriff or elected official, and shall receive an amount equal  
282 to one and six-tenths (1.6) percent of his final average salary multiplied by the  
283 number of his years of service rendered on and after January 1, 2010, other than  
284 as a member covered by the terms of a collective bargaining agreement, a  
285 deputy sheriff or elected official. A member, other than a member covered by  
286 the terms of a collective bargaining agreement, a deputy sheriff or elected  
287 official, whose continuous membership began after January 1, 1982 who meets  
288 the requirements for a normal pension shall receive an amount equal to one and  
289 one-half (1 1/2) percent of his final average salary multiplied by the number of  
290 his years of service rendered prior to January 1, 2010, other than as a member  
291 covered by the terms of a collective bargaining agreement, a deputy sheriff or  
292 elected official and shall receive an amount equal to one and six-tenths (1.6)  
293 percent of his final average salary multiplied by the number of his years of  
294 service rendered on and after January 1, 2010, other than as a member covered

295 by the terms of a collective bargaining agreement, a deputy sheriff or elected  
296 official.

297 (2) A member covered by the terms of a collective bargaining agreement, other than  
298 a deputy sheriff, whose continuous membership began prior to January 1, 1982  
299 who meets the requirements for a normal pension shall receive an amount equal  
300 to two (2) percent of his final average salary multiplied by the number of his  
301 years of service as a collective bargaining agreement member other than a  
302 deputy sheriff. A member covered by the terms of a collective bargaining  
303 agreement, other than a deputy sheriff, whose continuous membership began  
304 after January 1, 1982 who meets the requirements for a normal pension shall  
305 receive an amount equal to one and one-half (1 1/2) percent of his final average  
306 salary multiplied by the number of his years of service as a collective bargaining  
307 agreement member other than a deputy sheriff.

308 (3) A member who is a deputy sheriff whose continuous membership began prior to  
309 July 1, 1995 and who meets the requirements for a normal pension shall receive  
310 an amount equal to two and five-tenths (2.5) percent of his final average salary  
311 multiplied by the number of his years of service as a deputy sheriff. A member  
312 who is a deputy sheriff whose continuous membership began on or after July 1,  
313 1995 and who meets the requirements for a normal pension shall receive an  
314 amount equal to two (2) percent of his final average salary multiplied by the  
315 number of his years of service as a deputy sheriff. Incumbents of positions of  
316 chief investigator or investigator authorized in the office of the district attorney  
317 shall receive the same pension benefit as a deputy sheriff. Incumbents of the  
318 positions of airport fire chief, assistant airport fire chief, and fire fighter shall  
319 receive an amount equal to one and one-half (1 1/2) percent of their final  
320 average salary multiplied by the number of years of service for all service in  
321 these classifications prior to January 1, 1999, and two (2) percent of their final  
322 average salary multiplied by the number of years of service in these  
323 classifications for all service after December 31, 1998.

324 (34) A member who is an elected official whose continuous membership began  
325 prior to January 1, 1982 and who meets the requirements for a normal pension  
326 shall receive an amount equal to two and one-half (2 1/2) percent of his final  
327 average salary multiplied by the number of his years of service as an elected  
328 official. A member who is an elected official whose continuous membership  
329 began after January 1, 1982 and who meets the requirements for a normal  
330 pension shall receive an amount equal to two (2) percent of his final average  
331 salary multiplied by the number of his years of service as an elected official.

332 (45) If a member has service in more than one (1) of the foregoing job capacities,  
333 his pension shall be the sum of the amounts computed by multiplying his final  
334 average salary by the product of the foregoing benefit percentage for each such  
335 capacity and his service in each such capacity.

336 (56) If a member has service in one (1) or more of the foregoing job capacities as  
337 well as service as an employe of the state who receives part of his wage or salary  
338 from the county, his pension for service shall be equal to two and one-half (2  
339 1/2) percent or two (2) percent respectively of his final average salary paid by the  
340 county multiplied by the number of years of service as an elected county or state  
341 official and two (2) percent or one and one-half (1 1/2) percent respectively  
342 multiplied by the number of years of service other than as an elected official.

343 (67) The pension payable to a member under the provisions of this section 5.1  
344 shall not exceed eighty (80) percent of his final average salary increased by the  
345 post-retirement pension adjustment percentage in effect for each year of the  
346 member's continued employment after having accrued sufficient service to have  
347 become subject to the eighty-percent maximum percentage.

348 **SECTION 7.** Section 201.24 (5.15) of the General Ordinances of Milwaukee  
349 County, is amended as follows:

350 **5.15. Recruitment and retention incentive effective January 1, 2001.**

351 The provisions of this section shall apply to all members of the employes' retirement  
352 system eligible to accrue pension service credit as of January 1, 2001 who are not  
353 represented by a collective bargaining unit and file an application for retirement  
354 after January 1, 2001. This section shall supercede any provisions of section 5.1 that  
355 may conflict with this section. ~~This section shall also apply to any member of the~~  
356 ~~employes' retirement system who is represented by a collective bargaining unit that~~  
357 ~~has agreed with the provisions of this section.~~ The provisions of this section shall  
358 not apply to any member of the employes' retirement system who filed an  
359 application for retirement prior to January 1, 2001 which shall be effective on or  
360 after January 1, 2001. The provisions of this section shall not apply to members of  
361 the employes' retirement system who, as of January 1, 2001, are either eligible for a  
362 deferred vested retirement benefit under section 4.5 or are receiving a retirement  
363 benefit, unless such members return to a status eligible to accrue additional service  
364 credit on or after January 1, 2001. The provisions of this section shall not apply to  
365 years of service earned on or after January 1, 2010 by a member who, at the time  
366 the service is earned, is not covered by the terms of a collective bargaining  
367 agreement and who is not an elected official.

368 (1) If membership in the employes' retirement system initially began on or after  
369 January 1, 1982, the following recruitment and retention incentives shall apply:

370 (a) Except for a non-represented deputy sheriff whose membership began prior  
371 to July 1, 1995, and elected officials whose membership began on or after  
372 March 15, 2002, all pension service credit earned on and after January 1,  
373 2001 shall be credited in an amount equal to an additional 0.5 percent of the  
374 member's final average salary. For each year of service credit earned after

375 January 1, 2001, eight years of service credit earned prior to January 1, 2001  
376 shall be credited at an additional 0.5 percent of the member's final average  
377 salary. The additional service credits under this section 5.15(1)(a) shall not  
378 apply to any elected official whose membership began prior to March 15,  
379 2002 if such elected official consents irrevocably in writing filed with the  
380 system to waive the right to receive such additional pension service credits.

381 (b) An employe shall not be eligible for a deferred vested pension if his/her  
382 employment is terminated prior to his/her completion of five (5) years of  
383 service.

384 (2) Retention incentive bonus. If initial membership in the employes' retirement  
385 system began prior to January 1, 1982, or July 1, 1995 for a non-represented  
386 Deputy Sheriff, at the time of retirement, the member shall have their final  
387 average salary increased by a bonus of 7.5 percent for each year of pension  
388 service credit earned after January 1, 2001. The maximum bonus that shall be  
389 added to an eligible member's final average salary shall not be more than  
390 twenty-five (25) percent. This provision shall not apply to a member of the  
391 employes' retirement system who became a member of the system prior to  
392 January 1, 1982 and, as of January 1, 2001, is either eligible for a deferred  
393 vested benefit under 201.24 (4.5), or is receiving a pension benefit, unless such  
394 member returns to a status whereby the member is eligible to earn additional  
395 pension service credit on or after January 1, 2001. The retention incentive bonus  
396 under this section 5.15(2) shall not apply to any elected official who is otherwise  
397 eligible to receive such bonus if such elected official consents irrevocably in  
398 writing filed with the system to waive the right to receive such retention  
399 incentive bonus.

400 (3) Members who hold positions for which membership in the employes' retirement  
401 system is optional and opt for such membership, shall have pension service  
402 credit earned after January 1, 2001 credited at two (2) percent. However, such  
403 service credit shall not result in a multiplier increase for service credit earned  
404 prior to January 1, 2001 nor shall such service credit qualify the member for a  
405 retention incentive bonus.

406 The provisions of this section shall not apply to a member of the employes'  
407 retirement system who is either eligible for a deferred vested benefit under 201.24  
408 (4.5), or is receiving a pension benefit as of January 1, 2001, unless such member  
409 returns to active county employment and is eligible to earn additional pension  
410 service credit under 201.24.

411 **SECTION 8.** The provisions of this ordinance shall be effective January 1, 2010.

412 ; and

413 BE IT FURTHER RESOLVED, in the event collective bargaining agreements or  
414 arbitration decisions covering a majority of represented County employees include  
415 pension modifications that are not in agreement with the terms and provisions of  
416 Sections 3, 4, 5, 6, and 7 above, revisions to these ordinances shall be drafted  
417 within 90 days to match those settled or arbitrated pension modifications, subject to  
418 approval of the County Board.

419 non-rep package.2010.

**COUNTY OF MILWAUKEE**  
INTEROFFICE COMMUNICATION

DATE : December 8, 2009

TO : Supervisor Paul Cesarz, Chairman, Committee on Personnel  
Supervisor Elizabeth Coggs, Chairwoman, Committee on Finance and Audit

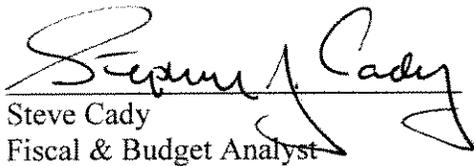
FROM : Steve Cady, Fiscal and Budget Analyst, County Board  
Jerome J. Heer, Director of Audits

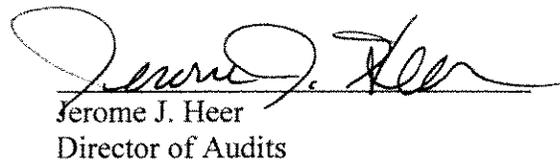
SUBJECT : Fiscal Note Review for the Non-Represented Wage and Benefit Modifications

We have reviewed the fiscal note prepared by the Department of Administrative Services regarding the proposed wage and benefit modifications for non-represented employees.

We agree with the assumptions, methodologies and conclusions presented in the fiscal note.

If you have any questions, do not hesitate to call us.

  
Steve Cady  
Fiscal & Budget Analyst

  
Jerome J. Heer  
Director of Audits

cc: Personnel Committee Members  
Dr. Karen Jackson, Director, DAS – Human Resources Division  
Greg Gracz, DAS – Labor Relations  
Cynthia Archer, Director, Department of Administrative Services  
Dee Hervey, Finance and Audit Committee Clerk, County Board Staff  
Steven Kreklow, Fiscal & Budget Administrator  
Scott Manske, Controller, Department of Administrative Services  
Richard Ceschin, Research Analyst, County Board Staff  
Jodi Mapp, Committee Clerk - Personnel

**MILWAUKEE COUNTY FISCAL NOTE FORM**

**DATE:** 12/07/09

Original Fiscal Note

Substitute Fiscal Note

**SUBJECT:** Modifications to Ordinance 17.10 Advancement within a Pay Range and  
 Modifications to Ordinance 17.14(7) Milwaukee County Group Health Benefit  
 Program (Modifications Only for Non-Represented Employees)

**FISCAL EFFECT:**

- |  |  |
|--|--|
| <input type="checkbox"/> No Direct County Fiscal Impact  | <input type="checkbox"/> Increase Capital Expenditures |
| <input type="checkbox"/> Existing Staff Time Required  | <input type="checkbox"/> Decrease Capital Expenditures |
| <input type="checkbox"/> Increase Operating Expenditures<br>(If checked, check one of two boxes below) | <input type="checkbox"/> Increase Capital Revenues     |
| <input type="checkbox"/> Absorbed Within Agency's Budget   | <input type="checkbox"/> Decrease Capital Revenues     |
| <input type="checkbox"/> Not Absorbed Within Agency's Budget   |  |
| <input checked="" type="checkbox"/> Decrease Operating Expenditures                                    | <input type="checkbox"/> Use of contingent funds       |
| <input type="checkbox"/> Increase Operating Revenues   |  |
| <input checked="" type="checkbox"/> Decrease Operating Revenues  |  |

*Indicate below the dollar change from budget for any submission that is projected to result in increased/decreased expenditures or revenues in the current year.*

	<b>Expenditure or Revenue Category</b>	<b>Current Year</b>	<b>Subsequent Year</b>
<b>Operating Budget</b>	Expenditure Reduction	0	-971,480
	Revenue Reduction		-136,080
	Net Savings	0	<u>-835,400</u>
<b>Capital Improvement Budget</b>	Expenditure		
	Revenue		
	Net Cost		

## DESCRIPTION OF FISCAL EFFECT

In the space below, you must provide the following information. Attach additional pages if necessary.

- A. Briefly describe the nature of the action that is being requested or proposed, and the new or changed conditions that would occur if the request or proposal were adopted.
- B. State the direct costs, savings or anticipated revenues associated with the requested or proposed action in the current budget year and how those were calculated.<sup>1</sup> If annualized or subsequent year fiscal impacts are substantially different from current year impacts, then those shall be stated as well. In addition, cite any one-time costs associated with the action, the source of any new or additional revenues (e.g. State, Federal, user fee or private donation), the use of contingent funds, and/or the use of budgeted appropriations due to surpluses or change in purpose required to fund the requested action.
- C. Discuss the budgetary impacts associated with the proposed action in the current year. A statement that sufficient funds are budgeted should be justified with information regarding the amount of budgeted appropriations in the relevant account and whether that amount is sufficient to offset the cost of the requested action. If relevant, discussion of budgetary impacts in subsequent years also shall be discussed. Subsequent year fiscal impacts shall be noted for the entire period in which the requested or proposed action would be implemented when it is reasonable to do so (i.e. a five-year lease agreement shall specify the costs/savings for each of the five years in question). Otherwise, impacts associated with the existing and subsequent budget years should be cited.
- D. Describe any assumptions or interpretations that were utilized to provide the information on this form.

**Note: The proposed ordinance modifications apply only to non-represented employees; therefore this fiscal note only provides the estimated savings that would result from the ordinance modifications for non-represented employees.**

### Modification to Ordinance 17.10 Advancement within a Pay Range:

- A. A resolution is being presented to the County Board to modify Ordinance 17.10 Advancement within a Pay Range. The changes in the ordinance would eliminate step increases for non-represented employees.
- B. The total net savings from eliminating step increases for non-represented employees is estimated at \$500,900. This estimate includes cost savings from FICA taxes and excludes savings from those positions that are funded by non-tax levy revenue sources.
- C. The 2010 budget includes estimated savings from eliminating step increases for all employees, including those that are represented by collective bargaining units. The total net savings from eliminating step increases for all employees, represented and non-represented, included in the 2010 budget is \$2,285,000.
- D. The estimated savings were calculated based upon 2009 payroll data.

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<sup>1</sup> If it is assumed that there is no fiscal impact associated with the requested action, then an explanatory statement that justifies that conclusion shall be provided. If precise impacts cannot be calculated, then an estimate or range should be provided.

**DESCRIPTION OF FISCAL EFFECT (continued)**

Modification to Ordinance 17.14(7) Milwaukee County Group Health Benefit Program:

A. A resolution is being presented to the County Board to modify Ordinance 17.14(7) Milwaukee County Group Health Benefit Program. The changes in the ordinance would modify provisions of the health benefits for non-represented employees including: increasing employee contributions for HMO and PPO plans, increasing PPO deductibles, increasing the PPO out-of-network co-payment percentage, increasing PPO out-of-pocket maximums, and increasing the emergency room co-payment for HMO and PPO plans.

B. The total net savings from applying the proposed health benefit medications to non-represented employees is estimated at \$334,500. This estimate excludes savings from those positions that are funded by non-tax levy revenue sources. The detail of the net savings is as follows:

• Employee contributions	\$184,900
• PPO deductibles	3,500
• PPO out-of-network co-pay	113,400
• PPO out-of-pocket maximums	3,500
• PPO and HMO emergency room co-pay	29,200

C. The 2010 budget includes estimated savings from applying the proposed health benefit modifications to all employees, including those that are represented by collective bargaining units. The total net savings from the proposed health benefit modifications for all employees, represented and non-represented, included in the 2010 budget is \$3,837,500. The detail of the net savings is as follows:

• Employee contributions	\$1,269,000
• PPO deductibles	66,600
• PPO out-of-network co-pay	2,147,400
• PPO out-of-pocket maximums	66,600
• PPO and HMO emergency room co-pay	287,900

D. The estimated savings were calculated based upon 2009 enrollment data and health care expenditure data.

Department/Prepared By DAs/Natalie Feggestad  
Authorized Signature   
Did DAS-Fiscal Staff Review?  Yes  No

**MILWAUKEE COUNTY FISCAL NOTE FORM**

DATE: 12/07/09

Original Fiscal Note

Substitute Fiscal Note

**SUBJECT:** Modifications to the following only for Non-Represented Employees:  
 Ordinance 201.24 (2.18) Normal Retirement Age;  
 Ordinance 201.24 (4.1) Normal Retirement;  
 Ordinance 201.24 (4.5) Deferred Vested Retirement;  
 Ordinance 201.24 (5.1) Normal Pension;  
 Ordinance 201.24 (5.15) Recruitment and Retention Incentive Effective January 1, 2001

**FISCAL EFFECT:**

- |  |  |
|--|--|
| <input type="checkbox"/> No Direct County Fiscal Impact  | <input type="checkbox"/> Increase Capital Expenditures |
| <input type="checkbox"/> Existing Staff Time Required  | <input type="checkbox"/> Decrease Capital Expenditures |
| <input type="checkbox"/> Increase Operating Expenditures<br>(If checked, check one of two boxes below) | <input type="checkbox"/> Increase Capital Revenues     |
| <input type="checkbox"/> Absorbed Within Agency's Budget   | <input type="checkbox"/> Decrease Capital Revenues     |
| <input type="checkbox"/> Not Absorbed Within Agency's Budget   |  |
| <input checked="" type="checkbox"/> Decrease Operating Expenditures                                    | <input type="checkbox"/> Use of contingent funds       |
| <input type="checkbox"/> Increase Operating Revenues   |  |
| <input checked="" type="checkbox"/> Decrease Operating Revenues  |  |

*Indicate below the dollar change from budget for any submission that is projected to result in increased/decreased expenditures or revenues in the current year.*

	<b>Expenditure or Revenue Category</b>	<b>Current Year</b>	<b>Subsequent Year</b>
<b>Operating Budget</b>	Expenditure Reduction		(800,000)
	Revenue Reduction		(112,000)
	Net Savings		(688,000)
<b>Capital Improvement Budget</b>	Expenditure		
	Revenue		
	Net Cost		

## DESCRIPTION OF FISCAL EFFECT

In the space below, you must provide the following information. Attach additional pages if necessary.

- A. Briefly describe the nature of the action that is being requested or proposed, and the new or changed conditions that would occur if the request or proposal were adopted.
- B. State the direct costs, savings or anticipated revenues associated with the requested or proposed action in the current budget year and how those were calculated.<sup>1</sup> If annualized or subsequent year fiscal impacts are substantially different from current year impacts, then those shall be stated as well. In addition, cite any one-time costs associated with the action, the source of any new or additional revenues (e.g. State, Federal, user fee or private donation), the use of contingent funds, and/or the use of budgeted appropriations due to surpluses or change in purpose required to fund the requested action.
- C. Discuss the budgetary impacts associated with the proposed action in the current year. A statement that sufficient funds are budgeted should be justified with information regarding the amount of budgeted appropriations in the relevant account and whether that amount is sufficient to offset the cost of the requested action. If relevant, discussion of budgetary impacts in subsequent years also shall be discussed. Subsequent year fiscal impacts shall be noted for the entire period in which the requested or proposed action would be implemented when it is reasonable to do so (i.e. a five-year lease agreement shall specify the costs/savings for each of the five years in question). Otherwise, impacts associated with the existing and subsequent budget years should be cited.
- D. Describe any assumptions or interpretations that were utilized to provide the information on this form.

**Note: The proposed ordinance modifications apply only to non-represented employees; therefore this fiscal note only provides the estimated savings that would result from the ordinance modifications for non-represented employees.**

Modification to Ordinance 201.24 (2.18, 4.1, and 4.5) Change in Retirement Age to 64 for new members of ERS after January 1, 2010, who are not covered by collective bargaining agreements, deputy sheriffs, or elected officials (i.e. non-represented employees)

- A. A resolution is being presented to the County Board to modify Ordinance 201.24 (2.18) Normal Retirement Age, Ordinance 201.24 (4.1) Normal Retirement, Ordinance 201.24 (4.5) Deferred Vested Retirement. The changes in the ordinance would change the normal retirement age for employees, not part of a collective bargaining agreement, whose initial membership in the retirement system began on or after January 1, 2010 to sixty-four (64). For all other members, the normal retirement age shall be age sixty (60), except for deputy sheriffs, who shall be age fifty-seven (57). This ordinance change will not impact current members, who are eligible for the Rule of 75. The Rule of 75 is applicable to most non-represented employees, whose enrollment in ERS began prior to January 1, 2006
- B. Per the report of the actuary, Buck Consultants, received on December 4, 2010, the total savings for 2010 by changing the normal retirement age from sixty (60) to sixty-four (64) for new, non-represented members of ERS is estimated to be \$40,000. If savings for departments that receive non-tax levy resources are eliminated the net savings would be reduced by \$6,000 to \$34,000.

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<sup>1</sup> If it is assumed that there is no fiscal impact associated with the requested action, then an explanatory statement that justifies that conclusion shall be provided. If precise impacts cannot be calculated, then an estimate or range should be provided.

**DESCRIPTION OF FISCAL EFFECT (continued)**

- C. The 2010 budget includes estimated savings from increasing the retirement age from age sixty (60) to age sixty-four (64) for new members of ERS. The total net savings included in the 2010 budget from changing the normal retirement age from 60 to 64 for all employees whose initial membership in ERS begins on or after January 1, 2010 is \$1,160,000. Per a report from Buck Consultants, the total dollar savings for changing the retirement age from 60 to 64 for all new members was \$1,462,000. A County-wide revenue offset percentage of 20.7% was used to reduce the savings by \$302,000, to \$1,160,000.
- D. The estimated savings for non-represented members were calculated based upon a report received from the actuary, Buck Consultants, and is attached as a reference document to this report.

Modification to Ordinance 201.24 (5.1 and 5.15) change in pension multiplier to 1.6 percent for all service credit earned after January 1, 2010, who are not covered by collective bargaining agreements, or a deputy sheriff, or elected official (i.e. non-represented employees)

- A. A resolution is being presented to the County Board to modify Ordinance 201.24 (5.1) Normal Pension and Ordinance 201.24 (5.15) Recruitment and Retention Incentive Effective January 1, 2001. The changes in the ordinance would change the pension percentage for all employees who are not part of a collective bargaining agreement, to one and six/tenths (1.6) percent for all service credit earned after January 1, 2010. For all other members, the pension percentage shall stay as defined in the ordinance.
- B. Per the report of the actuary, Buck Consultants, received on December 4, 2010, the total savings for 2010 by changing the pension percentage to 1.6 percent for non-represented members of ERS is estimated to be \$760,000. If savings for departments that receive non-tax levy resources are eliminated the net savings would be reduced by \$106,000 to \$654,000.
- C. The 2010 budget includes estimated savings from changing the pension multiplier for all employees to 1.6 percent for all pension service credit earned after January 1, 2010. The total net savings from changing the pension multiplier for all employees, represented and non-represented, included in the 2010 budget is \$3,665,000. Per a report from Buck Consultants, the total dollar savings for changing the multiplier for all members was \$4,620,000. A County-wide revenue offset percentage of 20.7% was used to reduce the savings by \$955,000, to \$3,665,000.
- D. The estimated savings for non-represented members were calculated based upon a report received from the actuary, Buck Consultants, and is attached as a reference document to this report.

Department/Prepared By DAS/ Scott Manske

Authorized Signature



Did DAS-Fiscal Staff Review?  Yes  No

December 4, 2009

Supervisor Paul M. Cesarz  
Chairman  
Pension Study Commission  
901 N. 9th St.  
Milwaukee, WI 53233

**RE: Actuary's Review Proposed Ordinance Amendment to the Employees' Retirement System for Non-Represented Employees, excluding Elected Officials and Deputy Sheriffs,**

Dear Supervisor Cesarz,

As requested, we have analyzed the actuarial impact on the Milwaukee County Employees' Retirement System of the attached, proposed ordinance amendments. If adopted, these amendments would decrease the multiplier from 2.0% to 1.6% for current members' future service & future hires' total service, and would increase the normal retirement age to 64 for future hires only. These changes would apply only to non-represented employees, excluding Elected Officials and Deputy Sheriffs. These changes would go into effect January 1, 2010.

*Actuarial Analysis*

The ordinance amendments affect current and future non-represented employees, excluding Elected Officials and Deputy Sheriffs, which includes 717 active employees as of January 1, 2009. In order to calculate the financial effect related to future employees for this group, we believe it is reasonable to assume that the financial effects of future employees will be similar to the effects of currently active employees under the most recent provisions. Therefore, in order to approximate the savings from this proposal for any future employees, we have examined the cost of the multiplier change and normal retirement age change by evaluating current non-represented employees, excluding Elected Officials and Deputy Sheriffs, that were hired after January 1, 2006.

Assuming that future hires have similar characteristics as current employees, we have estimated that a decrease in multiplier to this group's future service and an increase in normal retirement age to 64 would decrease the total present value of benefits as of January 1, 2009 from \$2.199B to \$2.193B.

The change in multiplier would decrease the present value of future normal cost as of January 1, 2009 from \$141.3M to \$137.2M. The effect of the multiplier change would be a decrease in the annual contribution from \$30.36M to \$29.60M. Thus, the multiplier change would have the effect of decreasing the annual required contribution by \$760,000.00 (\$0.76M).

Adding the retirement age change together with the multiplier change would decrease the present value of future normal cost as of January 1, 2009 from \$141.3M to \$136.7M. The overall effect of both changes would be a decrease in the annual required contribution from \$30.36M to \$29.56M, or a total of

Supervisor Paul M. Cesarz  
Chairman  
Pension Study Commission  
December 4, 2009  
Page 2

\$800,000.00 (\$0.8M). Thus, by itself, the change in the retirement age for future hires would have the effect of decreasing the annual required contribution by an additional \$40,000.00 (\$0.04M).

*Basis for the Analysis*

Unless otherwise noted below, we have based this analysis on the data, assumptions and methods used for the most recently completed valuation, which was as of January 1, 2009. We understand that these proposed amendments would only impact non-represented employees, excluding Elected Officials and Deputy Sheriffs.

It should be noted that the frequency of future hires will be one of the driving forces in the overall impact to the System should this proposed ordinance amendment be adopted.

The undersigned is a Member of the American Academy of Actuaries and meets the Academy's Qualification Standards to issue this Statement of Actuarial Opinion.

Please call if you have any questions.

Sincerely,



Larry Langer, ASA, EA, MAAA  
Principal, Consulting Actuary

cc: Mark Grady  
Marco Ruffini

Milwaukee County Cost Study

**Multiplier decrease from 2.0 to 1.6 for current members' future service &  
Normal Retirement Age of 64 for new hires & multiplier decreased from 2.0 to 1.6 for new hires and current members' future service**

Item	For Non-Represented Employees (excluding Elected Officials and Deputy Sheriffs)		
	Current Valuation	1) Multiplier Change - Future Service	2) Retirement Age of 64 & Multiplier Change
<b>Valuation Results</b>			
1. Present Value of Future Benefits			
a) Active Participants	\$ 812,317,967	\$ 806,132,858	\$ 806,132,858
b) Participants with Deferred Benefits	72,648,595	72,648,595	72,648,595
c) Participants Receiving Benefits	1,313,759,117	1,313,759,117	1,313,759,117
d) Total	\$ 2,198,725,679	\$ 2,192,540,570	\$ 2,192,540,570
2. Present Value of Future Normal Cost	\$ 141,348,691	\$ 137,232,987	\$ 136,700,182
3. Actuarial Accrued Liability: (1 - 2)	\$ 2,057,376,988	\$ 2,055,307,583	\$ 2,055,840,388
4. Actuarial Value of Assets	\$ 1,968,518,479	\$ 1,968,518,479	\$ 1,968,518,479
5. Funded Status: (4 / 3)	95.7 %	95.8 %	95.8 %
6. Unfunded Actuarial Accrued Liability: (3 - 4)	\$ 88,858,509	\$ 86,789,104	\$ 87,321,909
7. Normal Cost Rate	8.805 %	8.549 %	8.515 %
8. Normal Cost for the Plan Year	\$ 20,587,867	\$ 19,988,402	\$ 19,910,797
<b>Employer Actual Funding Contribution and Annual Required Contribution for Fiscal Year</b>			
9. Actual Funding Contribution Calculated by Actuary			
a) Normal Cost with Interest	\$ 21,395,539	\$ 20,772,557	\$ 20,691,908
b) Net Annual Amortization Payments	8,959,996	8,830,850	8,864,101
c) Total Contribution: ((a + b), not less than zero)	\$ 30,355,535	\$ 29,603,406	\$ 29,556,008
Savings per Report of Actuary		\$ 760,000	\$ 40,000

- 1) The cost studies above affect only non-represented employees and exclude elected officials and deputy sheriffs. This means that 717 out of the 4,837 Active members are affected by this change.
- 2) The Normal Cost for study 2 reflects the change immediately.
- 3) The Present Value of Benefits for study 2 only reflects the multiplier decrease for current members' future service.
- 4) The Retirement Rates used to develop Study 2 are shown below:

Age	General (backdrop eligible)		General (not backdrop eligible)	
	Current	Proposed	Current	Proposed
45	19.8	19.8	0.0	0.0
46	19.8	19.8	0.0	0.0
47	19.8	19.8	0.0	0.0
48	19.8	19.8	0.0	0.0
49	19.8	19.8	0.0	0.0
50	19.8	19.8	7.0	7.0
51	19.8	19.8	7.0	7.0
52	19.8	19.8	7.0	7.0
53	19.8	19.8	7.0	7.0
54	19.8	19.8	7.0	7.0
55	19.8	19.8	15.0	15.0
56	19.8	19.8	15.0	15.0
57	23.0	23.0	15.0	15.0
58	20.4	20.4	15.0	15.0
59	24.8	24.8	15.0	15.0
60	19.4	19.4	20.0	20.0
61	22.5	22.5	20.0	20.0
62	28.4	28.4	20.0	20.0
63	26.6	26.6	20.0	20.0
64	24.3	40.0	25.0	40.0
65	30.4	30.0	30.0	30.0
66	22.5	30.0	30.0	30.0
67	25.7	30.0	30.0	30.0
68	34.2	30.0	30.0	30.0
69	26.0	30.0	30.0	30.0
70	100.0	100.0	100.0	100.0
	current: 55&30 or 60 new: 55&30 or 64		current: 55&30 or 60 new: 55&30 or 64	

COUNTY BOARD  
CHAIRMAN

2009 DEC -8 AM 11:50

RECEIVED