



**Rebecca Grill**  
City Administrator  
City Administration Office  
414.302.8294  
rgrill@westalliswi.gov

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## MEMORANDUM

TO: Administration & Finance Committee

FROM: Rebecca Grill, City Administrator *rg*

RE: Department Request to Fill Vacant Positions

DATE: July 30, 2018

Attached is Steve Schaer's request to under fill the Lead Planner position with two Planner positions within the Department of Development.

According to our continuing procedure, these requests are formally referred to the Administration & Finance Committee for consideration through its normal Council/Committee referral process.

If you have any questions concerning this request, please contact me.

RG:jfw  
cc: Mayor  
HR Dept.  
John Stibal  
Steve Schaer

ADM\Vacpos\VACPOSREQ DEV PlannerPositions.08078



**John F. Stibal**  
Director  
Department of Development  
414.302.8460  
jstibal@westalliswi.gov

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July 27, 2018

Rebecca Grill  
West Allis City Administrator  
7525 W. Greenfield Ave.  
West Allis, WI 53214

Dear Ms. Grill,

I respectfully submit **two requests** for the August 7, 2018 Council meeting, seeking the Administration and Finance Committee's permission to under fill the Lead Planner position with two Planner positions within the Department of Development. Given vacant positions within the Department of Development, we are very eager to rebuild our staffing levels within the Department. With the departure of Bart Griepentrog and the recent promotion of Shaun Mueller to the Community and Economic Development Coordinator position, the Planner and Lead Planner positions are vacant. The under-fill would serve beneficial for re-building the staffing levels and growth within the Department as follows:

**First Request** - Katie Bennett has accepted our employment offer to the Planner position. The Planner position was previously authorized by Council in April per R-2018-0276. Her effective start date will be August 20, 2018. Upon successful completion of the 6-month probationary period, we seek to promote Katie Bennett to fill the Lead Planner position.

Katie Bennett's resume is well rounded, and her past volunteer and work experience will be of value not only initially as a Planner, but upon successful completion of her probationary period and promotion to Lead Planner. Based on our interviews with her, we feel her positive attitude and personality will also be a great fit within our team. Here is a summary of her accomplishments:

- Completed master's coursework from UW-Milwaukee. Ms. Bennett will be earning dual Master's Degrees in Urban Planning and Public Administration this summer.
- Recipient of UWM's Economic Development Fellowship which combines master's coursework with community based organizations. She has currently been working with the City of Milwaukee with their vacant lot program which encourages reuse and reinvestment in City lots.

- Prior to working in Milwaukee, she worked with two county governments in Michigan (Washtenaw and Genesee Counties) administering project based improvements through Community Development Block Grant federal funding.
- Served as a Peace Corps Volunteer in Moldova and worked to improve quality of life, enhance village planning and development efforts, including the introduction of civic engagement opportunities.

Ms. Bennett has built a strong foundation from which to excel and I feel will be very capable of her functioning at a high level while managing numerous City Planning projects including the planning and zoning review process, citizen engagement, neighborhood and land use planning and staff support to the City Plan Commission and Common Council.

**Second Request** – Planner Position Hire – In anticipation of the above referenced promotion, an inter-departmental lateral move of a current City employee into the Department of Development’s Planner position.

Attached are the two “Request to Fill Position” forms for the Lead Planner position and related JDQ's which provides additional information about this request and the positions. I am available to answer any questions you may have at any time. Thank you for your consideration of this request.

Sincerely,



Steven J. Schaer, AICP  
Manager of Planning and Zoning, Development Department

CC: John F. Stibal, Director of Development

sjs/jfs/gmj



# Request to Fill Position

Submit this form, a memorandum and current position description to the City Administrator for review and submittal to the Administration and Finance Committee. To ensure adequate time for review, submit the Friday prior to the Council Agenda Deadline day.

Department/Division: Development/Planning Position Title: **Lead Planner**

Reason for Request:  New Position OR  Replacement to Staff - Date of Vacancy: 7/24/2018

Person Replaced: Shaun Mueller

Position Status:  Full-time  Part-time AND  Regular  Temporary  Provisional  Special  Other

If other than Full-time or Regular, indicate work schedule (hours per week, days to be worked, etc.) and anticipated duration of employment: \_\_\_\_\_

Funding Source:  Operating  Grant  Other: \_\_\_\_\_

Anticipated Date for Filling Position: 8/7/2018 Planner and 2/20/19 Lead Planner

Is the position required for fiduciary, legal or compliance requirements?  No  Yes, describe:

**Why is it necessary that this position be filled? What operational needs does this position fulfill?**

The requested under-fill of Lead Planner position will replenish staff levels within the Department of Development. Bart Griepentrog formerly Lead Planner took a Director position with the Village of Shorewood. Shaun Mueller, formerly Lead Planner has accepted a promotion to the position of Community and Economic Development Coordinator.

In April of 2018, Council granted authority to hire for the Planner position under R-2018-0276. We've since interviewed and selected/hired Katie Bennett to the Planner position, and her effective start date is August 20. I am seeking Council approval to under-fill the Lead Planner position (currently vacant). If authorized, the under-fill would allow for a promotion of Katie Bennett to Lead Planner and the hire of a Planner as follows:

1. Promotion of Katie Bennett to Lead Planner after her 6 month Planner probationary period.
2. Hire of a Planner that would include an inter-departmental lateral move of a current City employee into the Department of Development's Planner position.

Operationally, the Planning Division is a highly collaborative Division and responds to many people and organizations including citizens, businesses, developers, neighborhood groups, elected officials and various committees and commissions and offers staff support to the same. Planning services is a highly professional division within the Department of Development that seeks to guide current and long range comprehensive land use planning, zoning, neighborhood planning and special project initiatives within the context of the Strategic Goals of the City.

**What will be the impacts on service functions to the public if the position is not filled?**

Service levels would be reduced and would impact longer term updates to zoning ordinance and comprehensive plans

**What will be the impacts on service to city staff if the position is not filled?**

The Manager of Planning and Zoning and a Planner will then handle over 200 annual planning and zoning reviews, 150 business and occupancy reviews relating to zoning administration.

**What reorganization possibilities have been considered, such as elimination of the position or combining**

**duties with other existing positions? (If none, provide rationale.)**

After review, and consultation with HR, we've decided to under-fill the Lead Planner position with two Planners. One of the Planners would be promoted to Lead Planner after the successful completion of their 6-month probationary period.

**How has this vacancy/need been covered so far?**

Existing staff. Manager of Planning and Zoning.

**How many other similar positions exist in this department?** No similar Non-Exempt positions.

Requestor Information Please Print:

Steven J. Schaer, AICP Manager of Planning and Zoning - Development \_\_\_\_\_  
Name Title Department

Signature/Date: *Stj Schaer* \_\_\_\_\_ 7 / 27 / 2018 \_\_\_\_\_

Attached:  Memorandum  Current Position Description

## Job Description Questionnaire

The purpose of the Job Description Questionnaire (JDQ) is to provide the information necessary to evaluate jobs for salary placement, classify jobs for various legal requirements, and to compile appropriate job descriptions.

Please read this JDQ carefully before answering any of the questions and then complete it as accurately, completely, and briefly as possible. While it is not necessary to describe each duty in great detail, it is important to provide sufficient information so the job can be accurately evaluated and classified. Keep in mind that *the purpose of the JDQ is to collect information about the job and is not designed to evaluate employee performance.*

Consider the typical responsibilities of the job; even those that might only occur cyclically (e.g. annually, quarterly, etc.). The responses should be based on duties and responsibilities that are part of the job under typical conditions, not special projects or temporary assignments. Further, unless specifically directed by management, describe the job as it is today, not as you believe it should be or what it might be in the future.

SECTION 1		DEMOGRAPHIC INFORMATION	
<b>Employee Name</b>	Shaun Mueller (now vacant)	<b>Employer Name</b>	City of West Allis
<b>Job Title</b>	Senior Planner (renamed to Lead Planner)	<b>Work Location</b>	City Hall
<b>Department</b>	Development	<b>Division</b>	Planning
<b>Full-Time / Part-Time</b>	Full-Time 40+ /week	<b>Part-Time (Hrs per Wk)</b>	n/a
<b>Supervisor Name</b>	Steven J. Schaer, AICP	<b>Supervisor Title</b>	Manager of Planning and Zoning Division

## SECTION 2

### DESCRIPTION OF ESSENTIAL DUTIES & RESPONSIBILITIES

Identify the essential duties / responsibilities of your job, which should be the most important aspects of the job. This section is focused on WHAT is done rather than HOW it is done. Use wording that will provide as clear an understanding as possible for someone not familiar with your work. Avoid terminology or acronyms that are not widely known outside of your line of work. Please list those duties that you feel are most important at the top of the list, and list the estimated percentage of the total annual time that each item takes. (*Remember, as a rule-of-thumb, that 10% equates to roughly 200 hours of a work year.*) To the extent possible, try to identify those duties and responsibilities that account for as close to 100% of your work time as possible. While catch-all categories are acceptable (e.g. misc. duties, other duties as assigned, etc.), those sections will likely NOT be evaluated.

**Frequency Codes:** Daily [D] / Weekly [W] / Bi-Weekly [B] / Monthly [M] / Quarterly [Q] / Annually [A] / As Needed [N]

#### Primary Duties

Primary Duties	Frequency	% of Annual Total Time
Directly interacts with citizens and the business community in relation to project management activities including the organization and review of development proposals throughout the municipal approval process (Site, Landscape, Architectural, Signage Review, zoning inquiries, zoning and ordinance amendments, Certified Survey maps and Planned Development Districts)	D	35
Performs specialized complex zoning and land use functions including review and implementation of planning initiatives and community revitalization activities (including Comprehensive Planning, Zoning Ordinance updates and involvement with consultant activities)	D	15
Processes the zoning portion of Occupancy Permit applications.	D	10
Manages Special Projects including Tax incremental Financing Plans, Park and Recreation Plan and implementation plans, National Ave Corridor Plan and implementation plan (Analyze and create solutions to negative trends in the City (ie. lack of park maintenance = park study, aging commercial corridors = National Avenue Corridor Strategic Plan)	W	10
Prepares staff reports, recommendations, provides staff support (liason) to various boards committees and commissions (Plan Commission, Common Council, CDA, Safety and Development Committee)	W	10
Mayor's liaison to the Historical Commission which brings with it many duties including special project supervision and creation, annual grant application submittal, maintaining eligibility as a "Certified Local Gov't" entity, special event planning (Settlers Weekend, Christmas Open House, Doors Open Milwaukee, etc...), providing neighborhood signage, maintaining the Log School Program, monitoring the condition of the Log School, Honey Creek Park, and Wadham's Gas Station.	W	5
Advises the Planning Manager on all planning-related matters	W	1
Supervises all organization staff, either directly or indirectly through senior staff	W	1

Assists in the investigation, analysis and recommendation of long term planning efforts, development opportunities with the City including, review of market studies, developer pro-formas and development, and collects analyzes and interprets a wide range of community and urban planning information.	B	3
Responding to Mayoral and Aldermanic Requests	B	5
Provide input in the Planning budget	A	1
Assist with professional research and administrative work for state and federal programs including grant submissions and reporting. Assembles and analyzes data for local and regional planning studies	A	2
Assists in the formulation of planning redevelopment studies – including the analysis of projected growth and development and form it should take on. Includes evaluation of proposals for planning consulting services agreements.	Q	2

### SECTION 3

### TOOLS AND TECHNOLOGY

Identify any software, technology, equipment or machinery utilized on a regular basis in order to perform the functions of the job:

Microsoft Office (Word, Excel, Access, PowerPoint, Outlook), ArcGIS, WebMap Adobe Photoshop, Adobe InDesign, BP Logix, CivicPlus, Dropbox, Internet, social media sites, computer, multi-line telephone, cell phone, digital camera, copy machine, fax machine, scanner, plotter, projector

### SECTION 4

### JUDGMENTS / DECISION-MAKING

Identify at least five of the most typical judgments/decisions that you make in performing your job as well as the solutions to these problems. Please also describe the resource, input or guidance others provide in arriving at your decision and who reviews, if anyone.

Typical Problems / Challenges	Possible Solution(s) to Problem/Challenge	Resources Available and/or Used	Job Title of Who Reviews
Striving to get the best project possible from applicants for Architectural, Site and Landscape and Signage Plan submittals and at the same time understanding that every project is different and every applicant has a different budget to work from and that this applicant may become a long-standing	Improvements to plans, grant assistance in certain situations, recommendations for extensions of time and consideration of policy changes.	Draw from my 15 years of experience, City Codes and Guidelines, other Planning Staff, visiting other communities and having an	Manager, Steven Schaefer



<p>business in the community, so keeping good relations is extremely important</p>		<p>understanding of the latest trends and materials being used. Encouraged to continue training and educational opportunities within the field.</p>	
<p>Long range/special plans – what to include, how to finalize, not all elected officials want the same thing, what gets included/excluded.</p>	<p>Get as much input up front as possible so that challenges can be met and answered, get buy-in from elected officials and citizens, incorporate input received, make goals of project outcomes clear</p>	<p>Experience, other planners, similar plans in other communities, consultants.</p>	<p>Manager, Steven Schaer</p>
<p>Zoning Reviews for Occupancy Permits - Does the use fit the zoning category of the site, is the site compliant to the approved plan, even if the use is compliant to zoning might the use be controversial, is the applicant aware of the city requirements</p>	<p>Good up front communication is the key. Letting the applicant know what their road map to occupancy will be like and what is expected and what challenges they may run into along the way.</p>	<p>Experience, ArcGIS, Intranet property information, other planners</p>	<p>Not a final review</p>
<p>Balancing being a policy writer with not being an actual policy maker. Pushing the boundaries to get the best results for the City by presenting policy ideas to the policy maker's while understanding that I am not a policy maker.</p>	<p>Understanding the positions of our policy makers. Educating policy makers for the betterment of the city. Push less, do less, care less.</p>	<p>Keeping an eye on trends in other communities and understanding the strengths and weaknesses of our community. What could be improved? What are our strengths?</p>	<p>Director, John Stibal</p>
<p>Conditions of approval in the staff report for the Plan Commission</p>	<p>Understanding the positions of the applicant and potential position of the Plan Commission and the code</p>	<p>Municipal Code, precedent and listening.</p>	<p>Manager, Steven Schaer</p>
<p>Prioritization of work – Requests come from Mayor, Alderpersons, Director, Manager, Economic Development, Historical Commission, applicants, potential owners, etc...</p>	<p>Understanding the big picture.</p>	<p>Other planners.</p>	<p>Director, John Stibal Manager, Steven Schaer</p>
<p>Understanding where to stop on a long</p>	<p>Alert Manager and Director.</p>		<p>Director, John Stibal</p>

range project. If something is well beyond the scope of my job do I take it on?	Manager, Steven Schaefer
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**SECTION 5 WORKING RELATIONSHIPS / INTERACTIONS / CONTACTS**

Please identify your typical work relationships with other persons inside or outside of your own organization.

<b>Title of Individuals With Whom You Typically Interact</b>	<b>Describe the Interaction</b>	<b>Why Was It Necessary?</b>
Large Scale Developer (multiple/large site development)	Informing them of the City's short and long range plans and the City's vision. Balancing that is with what is realistic. Working out the architectural, site and landscape details. Judging the potential impact to the immediate neighborhood and city and making recommendations to the Plan Commission and Common Council.	To get the best result from a project, to ensure the City's plans and standards are complied with, to ensure the plan works in the context of the area it is going in. To ensure the end product is one the City can be proud of.
Realtor	Zoning confirmation, plan confirmation, use and zoning process confirmation.	To allow for the sale or lease of property.
Historical Commission Members	Meetings and special events.	I am the City's representative that works with the Historical Commission. I put together the Agenda, minutes, grant applications, requests for work orders, sign off on deposits and spending.
Plan Commission Members	Plan Commission Meetings. Present the projects to them along with staff recommendations.	To give them an understanding of the projects, to represent the city's position on the project.
Mayor	Work with him on Plan Commission, Historical Commission, long-range planning projects and capital projects.	I am assigned Plan Commission and Historical Commission duties. In regards to special projects, I believe the Mayor comes to us for them because he respects our opinion and believes we can help get them done.
Alderspersons	Work with them on policy changes, ordinance amendments, special use permit, capital projects, long-range plans and capital projects.	We write the policies. We help push certain policies which may help the City. We assist to ensure quality capital projects and we complete long-range plans.
Architect	Work with them on façade changes, new buildings and additions to buildings. Take phone calls, meet with them several times over the course of project.	We ensure the quality of a project, ensure it meets the context of the neighborhood, ensure all design requirements and codes are being met.
Building Contractors	Many time will represent an owner on smaller	Ensure they are meeting all applicable design requirements,

	architectural or site changes	ensure quality plans, we help them thru the entire process from start to finish as it can be complicated.
Citizens	Answer zoning and development related questions, via phone, pop-ins and public meetings.	We are a voice for the City in these areas.
Public Works Dept.	Assistance with the needed maintenance of city owned buildings such as the Log School, Historical Society building, Wadham's Gas Station. Capital project reviews.	Act as a voice of the Historical Commission
Sign Contractors	Make sign requirements clear over the phone and via pop-ins. Review sign plans, ensure signs are code compliant for size and design.	We ensure that the sign works with the style of the building and that it meets the City's size and design requirements for signage. We ensure non-conforming signs are removed.
Small Business Owners/Entrepreneurs	Via phone, pop-ins or meetings. Answer zoning questions, make the process clear from them, be there to assist them thru the process from start to finish.	Ensure the applicant understands what can be a complicated process. We are many times the sounding board for a small business as they go thru the process.
Large Franchise Owners/Entrepreneurs	Via phone, pop-ins or meetings. Answer zoning questions, make the process clear from them, be there to assist them thru the process from start to finish.	Ensure the applicant understands what can be a complicated process. We are many times the sounding board for national franchises as they go thru the process.
Landscape Architects	Via phone, pop-ins or meetings. Ensure they understand the landscape requirements of the City.	Making sure the City gets as much and as high-quality of green space as possible on sites.
Engineering Dept.	Review of capital projects, special planning projects, long range plans and plan commission projects.	Our reviews many times lead to impacts in the right of way of which our Engineering Dept. is in charge. We convey Engineering Dept. requirements to our applicants and work as a go between. We also have begun to participate in the review of major road reconstruction projects. At times we have also pushed for policy change in Engineering requirements such as pushing them to allow canopy supports in the right of way and parklets.
Building Inspectors	We meet with them on our Technical Review meetings for our project as their input is important. We help communicate what their restrictions and requirements may be.	It is important for the applicant to understand what the building requirements may be as early on in the process as possible and we try to get an understanding of what they may even prior to plans being drawn up so that the applicant can understand if a certain building may work for them.
Attorneys	We work with City Attorneys on our ordinance and policy amendments and we use them at time to ensure we are enforcing gray areas of the code legally. We work with private attorney's on land use issues.	We write ordinance amendments, special use permits and policy changes, all of which are important legal documents/agreements. We also have to make gray area calls on what certain uses are and how they relate to the categories in our zoning code, the Attorney's office assists

		us in these areas.
Bankers	Via phone and meetings. In relation to pending property sales, ensuring land use works with the property, and we are many times involved with the design aspects of grant and loan projects.	Many times a bank may be looking for reassurance that a property's proposed use is compliant with the zoning code prior to sale or refinancing approval, they typically call us for that assurance. I also have assisted in several grant and loan projects.
Planning Consultants	On long range planning studies and on capital projects.	We help provide the content and direct consultants in our City's long-range plans and setup the scope of work. We work with them on capital projects to ensure work is done as planned.
City Forester	Assists in the review of plans.	Assures appropriate plantings.
Fire Inspectors	Assists in the review of plans, technical review meeting, phone calls, etc...	It helps the applicant to understand the Fire Dept.'s code requirements as early on in the process as possible, we work between the applicant and the Fire Dept. to ensure standards are as clearly understood as possible.
Chamber of Commerce	Phone calls, special events.	I have worked with the chamber in getting certain policies which businesses wanted changed, reviewed. I have assisted in helping them to understand why certain policies are in place.
Downtown Business Improvement District	Phone calls, meetings.	Ensure that this special district's unique zoning and sign codes are complied with. Have worked on several façade improvement projects with them, have acted as Steve's replacement and attended downtown design committee meetings.

## SECTION 6

## SUPERVISION / MANAGEMENT

Please indicate the type of responsibility you have as it pertains to leading others.

	Area of Action / Responsibility	Yes	No	Provides Input
Screen / Interview Applicants		x		
Hire / Promote Employees		x		
Provide Written/Verbal Warnings			x	



Standing / Walking / Climbing				
Squatting/Crouching/Kneeling/Bending			x	
Pushing / Pulling / Reaching Above Shoulder		x		
Work Environment	N/A			Frequently
Indoor/Office Work Environment				x
Noise >85dB (e.g. mower, heavy traffic, milling machine, etc.)	x			
Extreme Hot/Cold Temperatures (>90 degrees / <40 degrees)		x		
Outdoor Weather Conditions				
Hazardous Fumes or Odors / Toxic Chemicals		x		
Confined Spaces (as identified by OSHA)		x		
Close Proximity to Moving Machinery / Equipment		x		
Bodily Fluids / Communicable Diseases		x		
Working Alongside Moving Traffic on Roads				x
Electrical Hazards		x		

## SECTION 8

### ADDITIONAL EMPLOYEE COMMENTS

Please identify any other information that would help someone else understand your job more clearly:

Beyond what was described above, I have created a unique energy efficiency grant program and this year I created a sources and uses budget for park improvements over the next 5 years and have begun planning and reviewing individual park improvement projects.

**TO BE COMPLETED BY THE EMPLOYEE'S SUPERVISOR**

SECTION 9		SUPERVISOR INFORMATION
Supervisor Name		Supervisor Title

SECTION 10		EDUCATION REQUIRED FOR HIRE
Level of Education (Select one with an "X")	Field(s) of Study	
Less than High School Education		
High School Education (or Equivalent)		
One Year Certificate (or Equivalent)		
Associate's Degree (or Equivalent)		
Bachelor's Degree	X	
Master's Degree		
Professional Degree (Law, Medicine, etc.)		
PhD w/ Dissertation		
Other:		
Provide Any Additional Information Regarding the Required Education (e.g. preferred vs. required, specific coursework, etc.):  Bachelor's Degree in Urban Regional Planning, Architecture, Geography, Civil Engineering or Public Administration; 3 to 5 years of recent work experience in regional or urban planning; one year of recent work experience with MS Office applications, CAD and GIS operations.  Master's Degree and AICP preferred, a valid WI Driver's license		

SECTION 11					TOTAL EXPERIENCE REQUIRED UPON HIRE		
[Place an "X" in the appropriate cells]							
No Experience	< 2 yr.	2 to 3 yrs.	4 to 5 yrs.	6 to 7 yrs.	8 to 9 yrs.	10 to 11 yrs.	≥ 12 yrs.
		<b>3 yrs X</b>		<b>X</b>			

Describe Specific Experience Required for Hiring (e.g. 5 total years of customer service experience 2 of which were in a supervisory capacity):

Bachelor's Degree in Urban and Regional Planning. Also 3 to 5 Years of professional experience (in regional or urban planning)

<b>SECTION 12 CERTIFICATION / LICENSURE / TRAINING TO PERFORM JOB</b>			
<b>List Required Certification/Licensure/Training</b>	<b>How Attained/Provided</b>	<b>Required Upon Hire?</b>	<b>May Obtain After Hire?</b>
AICP preferred	American Planning Association	No	Yes
Describe any current practices as it relates to licensure or certification (e.g. extra pay for certification, employer payment for obtaining or renewing, etc.):			
Employer encourages and will pay for obtaining certification			

<b>SECTION 13 SUPERVISOR'S COMMENTS / CORRECTIONS / ADDITIONS</b>	
<b>JDQ Section</b>	<b>Comment / Clarification / Addition</b>
2	Total percentage of hours didn't add up initially as submitted. Some redundancy corrected.
2	Consolidated primary duties and balanced time
3	Updated Tools and Technology to reflect the wide variety of resources commonly utilized and available
Manager, Steven Schaer, AICP comment:	Shaun performs at a high level within a very specialized complex range of duties for our Planning Division, and also crosses into Redevelopment functions as well; He has previously obtained certification with the National Development Council as an Economic Development Finance Professional (EDFP). I value his input, project management, administration and coordination with projects including the Six Points neighborhood redevelopment area, Juneau Highlands neighborhood district and with management of private/outside consultants in preparation of the National Ave. corridor project plan and the Park and Outdoor Recreation Plan.  Shaun has also been instrumental in our Divisions role of transitioning to an online Occupancy Permit process and in his team leader role in the Lean Management Planning Project.  As a liaison to the Plan Commission, Historical Commission and Common Council, Shaun provides excellent and personable



support given his depth of experience in public service and knowledge of Planning. He frequently presents his analysis and recommendations before the Plan Commission and Historical Commission.

Shaun is highly independent and collaborates, responds to / serves many people, including citizens, Managers, Department heads, appointed officials and elected representatives, with little daily supervision.





# Request to Fill Position

Submit this form, a memorandum and current position description to the City Administrator for review and submittal to the Administration and Finance Committee. To ensure adequate time for review, submit the Friday prior to the Council Agenda Deadline day.



Department/Division: Development/Planning Position Title: Planner

Reason for Request:  New Position OR  Replacement to Staff - Date of Vacancy: 12/1/2017

Person Replaced: Bart Griepentrog

Position Status:  Full-time  Part-time AND  Regular  Temporary  Provisional  Special  Other

If other than Full-time or Regular, indicate work schedule (hours per week, days to be worked, etc.) and anticipated duration of employment: \_\_\_\_\_

Funding Source:  Operating  Grant  Other: \_\_\_\_\_

Anticipated Date for Filling Position: 8/7/2018 Planner



Is the position required for fiduciary, legal or compliance requirements?  No  Yes, describe:

### Why is it necessary that this position be filled? What operational needs does this position fulfill?

The requested under-fill of Lead Planner position will replenish staff levels within the Department of Development. Bart Griepentrog formerly Lead Planner took a Director position with the Village of Shorewood. Shaun Mueller, formerly Lead Planner has accepted a promotion to the position of Community and Economic Development Coordinator.

In April of 2018, Council granted authority to hire for the Planner position under R-2018-0276. We've since interviewed and selected/hired Katie Bennett to the Planner position, and her effective start date is August 20. I am seeking Council approval to under-fill the Lead Planner position (currently vacant), and secondly (with this request) the Planner position which will become vacant with the promotion of Katie Bennett to Lead Planner.

1. Promotion of Katie Bennett to Lead Planner after her 6 month Planner probationary period.
2. Hire of a Planner that would include an inter-departmental lateral move of a current City employee into the Department of Development's Planner position.

Operationally, the Planning Division is a highly collaborative Division and responds to many people and organizations including citizens, businesses, developers, neighborhood groups, elected officials and various committees and commissions and offers staff support to the same. Planning services is a highly professional division within the Department of Development that seeks to guide current and long range comprehensive land use planning, zoning, neighborhood planning and special project initiatives within the context of the Strategic Goals of the City.

### What will be the impacts on service functions to the public if the position is not filled?

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### What will be the impacts on service to city staff if the position is not filled?

The Manager of Planning and Zoning and a Planner will then handle over 200 annual planning and zoning reviews, 150 business and occupancy reviews relating to zoning administration.

**What reorganization possibilities have been considered, such as elimination of the position or combining duties with other existing positions? (If none, provide rationale.)**

After review, and consultation with HR, we've decided to under-fill the Lead Planner position with two Planners. One of the Planners would be promoted to Lead Planner after the successful completion of their 6-month probationary period. This pending promotion would create vacancy in the Planner position. We are requesting to fill the Planner position now with an inter-departmental lateral move of a current City employee into the Department of Development's Planner position.

**How has this vacancy/need been covered so far?**

Existing staff. Manager of Planning and Zoning.

**How many other similar positions exist in this department?** No similar Non-Exempt positions.



**Requestor Information**

Please Print: Steven J. Schaer, AICP Manager of Planning and Zoning – Development Department

Signature/Date: Name Title Department  
 7 / 27 / 2018

Attached:  Memorandum  Current Position Description

## Job Description Questionnaire

The purpose of the Job Description Questionnaire (JDQ) is to provide the information necessary to evaluate jobs for salary placement, classify jobs for various legal requirements, and to compile appropriate job descriptions.

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SECTION 1		DEMOGRAPHIC INFORMATION	
<b>Employee Name</b>	Bart Griepentrog, AICP (now vacant)	<b>Employer Name</b>	City of West Allis
<b>Job Title</b>	Planner II (renamed to Planner)	<b>Work Location</b>	West Allis, WI
<b>Department</b>	Development	<b>Division</b>	Planning & Zoning
<b>Full-Time / Part-Time</b>	Full-Time 40+ hours/week	<b>Part-Time (Hrs per Wk)</b>	N/A
<b>Supervisor Name</b>	Steven J. Schaer, AICP	<b>Supervisor Title</b>	Manager, Planning & Zoning Division

## SECTION 2

### DESCRIPTION OF ESSENTIAL DUTIES & RESPONSIBILITIES

Identify the essential duties / responsibilities of your job, which should be the most important aspects of the job. This section is focused on WHAT is done rather than HOW it is done. Use wording that will provide as clear an understanding as possible for someone not familiar with your work. Avoid terminology or acronyms that are not widely known outside of your line of work. Please list those duties that you feel are most important at the top of the list, and list the estimated percentage of the total annual time that each item takes. *(Remember, as a rule-of-thumb, that 10% equates to roughly 200 hours of a work year)*. To the extent possible, try to identify those duties and responsibilities that account for as close to 100% of your work time as possible. While catch-all categories are acceptable (e.g. misc. duties, other duties as assigned, etc.), those sections will likely NOT be evaluated.

**Frequency Codes:** Daily [D] / Weekly [W] / Bi-Weekly [B] / Monthly [M] / Quarterly [Q] / Annually [A] / As Needed [N]

#### Primary Duties

#### WITHIN CURRENT JOB DESCRIPTION

Primary Duties	Frequency	% of Annual Total Time
Interacts with citizens, the business/development community and elected/appointed officials in relation to land use applications (provides recommendations and/or approvals for Special Use Permits, Site, Landscaping and Architectural Improvements, Signage, Zoning Verifications, Rezoning, Ordinance Amendments, Certified Survey Maps and Planned Development Districts)	D	40%
Processes Business Occupancy Permit applications, including zoning verification, and performs corresponding site, landscaping, screening and architectural plan reviews for compliance and enforcement	D	10%
Provides staff support for the Plan Commission, Safety and Development Committee and Community Development Authority, including agendas, resolutions, staff reports and multi-media public presentations	M	5%
Conducts studies and prepares reports, including but not limited to demographics, infrastructure, redevelopment efforts and community needs utilizing public and private data resources, surveys and other localized public participation efforts	A	2%
Assists in the preparation of updates to the City's Comprehensive Plan	A	2%
Produces Maps and Mailing Labels for Public Hearing notifications	B	2%
Assists with business recruitment efforts, including site selection responses and business inquiries	N	2%
Maintains database and filing system of property files	W	2%
Administers the Department web pages	M	2%
<b>ABOVE CURRENT JOB DESCRIPTION</b>		
Manages and implements Special Projects focused on community/neighborhood revitalization, as assigned, including Tax Incremental Financing Plans, Redevelopment Plans, Community Development Block Grant projects, Park Implementation, Commercial Corridor Planning, Bike and Pedestrian Plan Implementation, Bike Share and Public Art	N	10%

Participates in meetings with developers, architects, consultants and contractors pertaining to redevelopment projects; and, drafts and/or reviews corresponding market studies, proposals, proformas and development agreements	N	5%
Researches, drafts and implements zoning code updates, both independently and at the request of, applicants, Plan Commissioners and/or Alderpersons	N	5%
Trains and provides reference materials and supervision to annual Department interns	D	5%
Reviews and provides comments and policy recommendations for current, sub-area, long-range and regional planning efforts.	N	2%
Works with the Engineering Department and hired consultants to implement Complete Streets practices and identify/resolve priorities	A	2%
Writes and reviews press releases, grant applications (including State and Federal reporting requirements), and newsletter articles	N	2%
Develops programs for local business improvements and growth, including business assistance, façade improvements, signage, and site enhancements	N	2%

### SECTION 3

### TOOLS AND TECHNOLOGY

Identify any software, technology, equipment or machinery utilized on a regular basis in order to perform the functions of the job:

Microsoft Office (Word, Excel, Access, PowerPoint, Outlook), ArcGIS, WebMap Adobe Photoshop, Adobe InDesign, BP Logix, CivicPlus, Dropbox, Internet, social media sites, computer, multi-line telephone, cell phone, digital camera, copy machine, fax machine, scanner, plotter, projector

### SECTION 4

### JUDGMENTS / DECISION-MAKING

Identify at least five of the most typical judgments/decisions that you make in performing your job as well as the solutions to these problems. Please also describe the resource, input or guidance others provide in arriving at your decision and who reviews, if anyone.

Typical Problems/Challenges	Possible Solution(s) to Problem/Challenge	Resources Available and/or Used	Job Title of Who Reviews
Working with other Departments to implement "special projects"	Maintain persistent open communication and understanding of personal roles and responsibilities	Project management experience, co-workers	none
Working with applicants to identify required reviews/approvals	Business-friendly communication skills and wide breadth of project experience to understand and assess scope of project based on information provided	Municipal Code, previous experience, project handouts, review checklist, internal planning	Manager

		politics and co-workers	
Prioritizing daily work load to respond to multiple layers of oversight	Maintain project lists and participate in regular meetings to communicate progress and identify next steps and desired outcomes	Previous experience, staff meetings, and understanding of deadlines, policies and strategic plans	none
Responding to requests to review work and general collaborative inquiries from co-workers and management	Assess the urgency of requested response and respect my co-workers' request with a timely response or communication, based on known deadlines and personal workload	Outlook (e-mail and calendar), project lists, and understanding of deadlines, policies and strategic plans	Co-workers
Maintaining knowledge of current practices and regional competition	Prioritize time for professional development, training and research relevant to proactive growth	Professional organizations, publications, listservs, conferences, published data, case studies and daily observation of surroundings (on and off work time)	none
Training and assisting annual planning interns	Design and continually update handouts and reference material for ease of training and annual transition purposes	Municipal Code, procedural handouts, reference materials, previous experience	none

## SECTION 5

### WORKING RELATIONSHIPS / INTERACTIONS / CONTACTS

Please identify your typical work relationships with other persons inside or outside of your own organization.

Title of Individuals With Whom You Typically Interact	Describe the Interaction	Why Was It Necessary?
Developers	Review and respond to general and specific redevelopment plans/inquiries. Attend meetings, maintain communications and general rapport.	To facilitate redevelopment and promote the stabilization/regeneration of neighborhoods.
Architects/Contractors	Respond to inquiries and requirements, review plans and provide comment/recommendations on revisions, based on code, guideline and Plan Commission stipulations.	To facilitate site, landscaping, architectural and signage improvements.



Business Owners	Respond to inquiries and requirements in relation to opening a business, with attention to the needs of various aspects including development, building code, engineering procedures, licenses, health and others.	To facilitate business retention and growth.
Citizens / Property Owners	Respond to general inquiries and gather public input in relation to planning/development requirements and plan implementation	To serve the public interest and provide information.
Manager, Planning & Zoning	Provide plan review comments and recommendations for approval; collaborate on planning policies and special projects.	To collaborate on site, landscaping, architectural and signage reviews, and implement the general policies and procedures of the Planning Division.
Director of Development	Provide project updates on general planning activities and special projects, prepare presentation materials for Public Hearings and special meetings, provide insights on current planning policies and improvement opportunities	To provide project updates, implement daily duties and special assignments, as requested
Director of Building Inspections & Neighborhood Services	Provide plans and draft Ordinance amendments for review in relation to Building Code requirements.	To facilitate site and architectural reviews, and code updates.
Plan Examiners (Building Inspectors, Engineering, Forestry)	Provide plans for review, clarify requirements and reiterate recommendations to applicants.	To facilitate conversations with citizens, business owners, property owners, architects/contractors and developers on plans and projects
Principal Engineers	Respond to requests for review on projects, inquire on project improvements, as they relate to planning policies.	To implement Complete Streets policies and advocate for public/neighborhood improvements that serve the multiple needs of the city, beyond traffic management.
Mayor	Respond to requests for special project implementation, and provide updates, general concepts and presentations related to planning policies and procedures.	To implement special projects and encourage the advancement of planning policies and procedures.
Senior Planner	Collaborate on task assignments and mutually review plans/projects.	To implement the City's planning policies and procedures.
Manager, Community Development	Respond to requests for collaboration on business assistance plans and policies.	To provide requested information, data and suggestions relating to economic development initiatives.
Alderpersons	Respond to questions and directives in relation to implementing/updating the City's codes, policies and procedures through routine communication and formal presentation, and provide projects for approval, as required.	To facilitate project approval and update City policies.
Director of Engineering & Public Works	Provide plans and draft Ordinance amendments for review in relation to Engineering requirements; request	To facilitate site and landscaping reviews, and special projects, particularly park and public space improvements.

	information/action in order to facilitate special project implementation for public improvements and special projects.	
Plan Commissioners	Provide written summary, recommendations and oral presentation for monthly meetings and required follow-up.	To facilitate project approval and update City policies.
Clerks (Interdepartmental)	Provide and request information/documents for publication and/or mailing, etc.	To facilitate State and Local publication requirements and communicate formal determinations
Planning Intern	Train, guide and assist with projects	To train new interns on planning policies and procedures.

**SECTION 6 SUPERVISION / MANAGEMENT**

Please indicate the type of responsibility you have as it pertains to leading others.

Area of Action / Responsibility	Yes	No	Provides Input
Screen / Interview Applicants	X		
Hire / Promote Employees		X	
Provide Written/Verbal Warnings		X	
Suspend Employees		X	
Terminate Employees		X	
Prepare Work Schedules For Others	X		
Project Management	X		
Provide Work Direction For Others	X		
Evaluate Performance Of Others		X	
Counsel Employees		X	
Train Employees (As Part Of The Normal Duties Of The Job)	X		
Approve Overtime		X	
Approve Time Off Request For Others		X	
Develop / Implement Policies			X
Do you <b>directly</b> supervise any employees? <i>If yes, please list the number of FTEs and job titles of those employees below:</i>	X		

Job Title	# of FTEs
Planner I	vacant
Intern	temporary

## SECTION 7 WORK ENVIRONMENT / PHYSICAL REQUIREMENTS

Please indicate the amount of time typically spent in the following categories.

Physical Requirements	[Place an "X" in the appropriate cells]			
	N/A	Rarely	Occasionally	Frequently
Carrying/Lifting 10 - 40 Pounds			X	
Carrying/Lifting > 40 Pounds		X		
Sitting			X	
Standing / Walking / Climbing				X
Squatting/Crouching/Kneeling/Bending		X		
Pushing / Pulling / Reaching Above Shoulder		X		
Work Environment	N/A	Rarely	Occasionally	Frequently
Indoor/Office Work Environment				X
Noise >85dB (e.g. mower, heavy traffic, milling machine, etc.)	X			
Extreme Hot/Cold Temperatures (>90 degrees / <40 degrees)		X		
Outdoor Weather Conditions		X		
Hazardous Fumes or Odors / Toxic Chemicals	X			
Confined Spaces (as identified by OSHA)	X			
Close Proximity to Moving Machinery / Equipment	X			
Bodily Fluids / Communicable Diseases	X			
Working Alongside Moving Traffic on Roads	X			
Electrical Hazards	X			

**SECTION 8**

**ADDITIONAL EMPLOYEE COMMENTS**

Please identify any other information that would help someone else understand your job more clearly:

This position is highly independent and collaborates, responds to / serves many people, including citizens, Managers, Department heads, appointed officials and elected representatives, with little daily supervision.

**TO BE COMPLETED BY THE EMPLOYEE'S SUPERVISOR**

SECTION 9			SUPERVISOR INFORMATION	
Supervisor Name	Steven J. Schaer, AICP	Supervisor Title	Manager of Planning and Zoning	

SECTION 10		EDUCATION <u>REQUIRED</u> FOR HIRE
	Level of Education (Select one with an "X")	Field(s) of Study
	Less than High School Education	
	High School Education (or Equivalent)	
	One Year Certificate (or Equivalent)	
	Associate's Degree (or Equivalent)	
	Bachelor's Degree	X
	Master's Degree	
	Professional Degree (Law, Medicine, etc.)	
	PhD w/ Dissertation	
	Other:	

Provide Any Additional Information Regarding the Required Education (e.g. preferred vs. required, specific coursework, etc.):

Bachelor's Degree in Urban or Regional Planning or related field, such as political science, urban geography, urban sociology or urban studies.  
 Master's Degree and AICP desirable.

Three to five years of recent work experience in urban or regional planning/development, including GIS and MS Office (includes Excel) applications.

One year of recent work experience in architectural review, plan review and site/landscaping design desirable.

Possession of a valid WI Driver's license

**SECTION 11**

**TOTAL EXPERIENCE REQUIRED UPON HIRE**

[Place an "X" in the appropriate cells]

No Experience	< 2 yr.	2 to 3 yrs.	4 to 5 yrs.	6 to 7 yrs.	8 to 9 yrs.	10 to 11 yrs.	≥ 12 yrs.
		3yrs X	X				

Describe Specific Experience Required for Hiring (e.g. 5 total years of customer service experience 2 of which were in a supervisory capacity):

**SECTION 12**

**CERTIFICATION / LICENSURE / TRAINING TO PERFORM JOB**

List Required Certification/Licensure/Training	How Attained/Provided	Required Upon Hire?	May Obtain After Hire?
AICP desirable	Bart has obtained this certification	No	Yes

Describe any current practices as it relates to licensure or certification (e.g. extra pay for certification, employer payment for obtaining or renewing, etc.):  
Employer has paid for Bart's certification

**SECTION 13**

**SUPERVISOR'S COMMENTS / CORRECTIONS / ADDITIONS**

In lieu of altering an employee's JDQ, please provide any corrections, clarifications, or additional information in the space provided below.

JDQ Section	Comment / Clarification / Addition
Manager, Steven Schaefer, AICP comment:	While currently classified as a Planner II, Bart functions at a higher level than his current job description indicates/ requires. Highly independent and collaborative in his role, he responds to / serves many people, including citizens, Managers, Department heads, appointed officials and elected representatives, with little daily supervision. The Department is currently considering reorganizing its current structure to create a new higher level position, titled Strategic Development Planner, better suited to the needs of the Department. The position would include a blend of more advanced Planning responsibilities and management of a variety of Redevelopment and Revitalization initiatives.
	I appreciate Bart's insight and perspective on Planning projects as it is well prepared and often thought provoking and professional. Here are some projects where his talent is apparent: a) Mural project management – through implementation;

b) West Allis Skate Park (planning and design through construction/implementation).

Bart is very good at balancing his time among various current/daily and longer range planning and special projects. He has also been instrumental in our Divisions role of transitioning to an online Occupancy Permit process and in his team role in the Lean Management Planning Project.

**To BE COMPLETED BY ADMINISTRATIVE DESIGNEE**

**SECTION 14**

**SUPERVISOR INFORMATION**

Administrative Designee Name	Administrative Designee Title
John F. Stibal	Director of Development

**SECTION 15**

**ADMINISTRATIVE COMMENTS / CORRECTIONS / ADDITIONS**

In lieu of altering an employee's JDQ, please provide any corrections, clarifications, or additional information in the space provided below.

JDQ Section	Comment / Clarification / Addition