

# ***RESOLUTION NO.: 55—2024-25***

TO THE HONORABLE, THE OUTAGAMIE COUNTY BOARD OF SUPERVISORS

LADIES AND GENTLEMEN:

*2/3 MAJORITY – 24 VOTES*

1 The Outagamie County Veterans Service Office is requesting to approve the following  
2 amendments to their Table of Organization:

- 3 • Delete one (1) full-time Deputy Veterans Service Officer position
- 4 • Add one (1) full-time Senior Benefits Specialist position

5  
6 The Veterans Service Office has elected to eliminate the position of Deputy Director and add  
7 a Senior Benefit Specialist position, as the need in the office is for a more public facing  
8 position. The position will be filled by an existing employee and as such will increase the  
9 Salaries line item by \$2,551 and increase the Fringe Benefits line item by \$433 for a total of  
10 \$2,984. The department is requesting the additional funding from the Contingency Fund.

11 NOW THEREFORE, the undersigned members of the Legislative/Audit and Human Resources

12  
13 Committee recommend adoption of the following resolution.

14 BE IT RESOLVED, that the Outagamie County Board of Supervisors does approve an in-year  
15 Table of Organization request for the Veterans Service Office effective August 25, 2024, to delete one (1)  
16 full-time Deputy Veterans Service Officer position and add one (1) full-time Senior Benefits Specialist  
17 position as noted on the attached Position Deletion Form – 2024 Budget, Position Addition Form – 2024  
18 Budget, Job Description, and Table of Organization, which by reference are made a part hereof, and

19 BE IT FURTHER RESOLVED, that the Outagamie County Board of Supervisors does approve  
20 of increasing the Veterans Service Salaries line item by \$2,551; increasing the Veterans Service Fringe  
21 Benefits line item by \$433; and decreasing the Reserve for Contingency line item by \$2,984 as noted on  
22 the attached fiscal note, which by reference is made a part hereof, and

23 BE IT FINALLY RESOLVED, that the Outagamie County Clerk be directed to forward a copy of  
24 this resolution to the Outagamie County Human Resources Director, the Outagamie County Finance  
25 Director, and the Veterans Service Officer.

26 Dated this \_\_\_\_\_ day of October 2024

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Respectfully Submitted,

LEGISLATIVE/AUDIT & HUMAN RESOURCES  
COMMITTEE

\_\_\_\_\_  
Cathy Spears

\_\_\_\_\_  
Sara MacDonald

\_\_\_\_\_  
Ryan Ferguson

\_\_\_\_\_  
John Kostelny

\_\_\_\_\_  
Sarah Weinberg

Duly and officially adopted by the County Board on: \_\_\_\_\_

Signed: \_\_\_\_\_  
Board Chairperson

\_\_\_\_\_  
County Clerk

Approved: \_\_\_\_\_

Vetoed: \_\_\_\_\_

Signed: \_\_\_\_\_  
County Executive

<b>POSITION DELETION FORM - 2024 BUDGET</b>		
<b>Completion Checklist</b>		
<b>Request Details</b>		
Effective Date of Requested Change:	8/25/2024	
Department:	Veterans Service Office	
Department Head:	Kelly Bales	
Cost Center Number:	1008700	
Position Title:	Deputy Veterans Service Officer	
Sunset Position? (Yes or No)	No	
Is this position full time or part time? <i>(If more than one position, use the worksheet for Multiples)</i>	Full Time:	1
	Part Time:	
If adding a position to offset this deletion; which position(s) will be added?	Sr. Benefits Specialist	
<b>Position Justification</b>		
Briefly summarize why this position is no longer needed, as well as areas of revenue and savings.		
<b>Employee Impacted By This Change (if no one in position - leave blank)</b>		
<b>Fiscal Data</b>		
<b>PROJECTED COST SAVINGS</b>		
Salary	\$	60,466
Fringe Benefits	\$	8,798
Travel/Training	\$	-
Supplies	\$	-
Purchased Services	\$	-
Capital Outlay	\$	-
<b>TOTAL COST SAVINGS</b>	\$	<b>69,263</b>
<b>DECREASED REVENUES BY DELETING THIS POSITION:</b>		
Please list below the decreased revenues pertaining to this position deletion.		
<i>Description</i>	<i>Dollar Value (enter as negative)</i>	
	\$	-
	\$	-
	\$	-
<b>TOTAL REVENUE REDUCTION</b>	\$	-
<b>NET COUNTY COST (Levy/Fund Balance)</b>	\$	<b>69,263</b>

<i>TO BE COMPLETED BY HUMAN RESOURCES:</i>	
Reviewed by HR	
County Executive Decision (Approved/Denied)	

<b>POSITION ADDITION FORM - 2024 BUDGET</b>		
<b>Completion Checklist</b>		
<ul style="list-style-type: none"> <li>o A visual of your proposed Table of Organization</li> <li>o Job description for the position requested below, highlighting any changes from current JD</li> <li>o Completed McGrath Consulting Position Questionnaire (if position is not currently on wage schedule)</li> </ul>		
<b>Request Details</b>		
Effective Date of Requested Change:	<b>8/25/2024</b>	
Department:	<b>Veterans Services Office</b>	
Department Head:	<b>Kelly Bales</b>	
Cost Center Number:	<b>1008700</b>	
Position Title:	<b>Sr. Benefits Specialist</b>	
Sunset Position? (Yes or No)	<b>No</b>	
Exempt (Salaried) or Non-Exempt (Hourly):	<b>Non-Exempt</b>	
Pay Grade of Position:	<b>135</b>	
Estimated Starting Step:	<b>10</b>	
Position exists in current the Table of Organization?		
Is this position full time or part time? <i>(If more than one position, use the worksheet for Multiples)</i>	Full Time:	<b>1</b>
	Part Time:	
If Part Time position, how many hours per week will this position be working?	Hours:	
What other alternatives were considered?		
If deleting a position to add this position; which position(s) will be deleted?	<b>Deputy Veterans Service Officer</b>	
(If deleting a position, complete the Position Deletion Form and include the Cost Savings below)		
List any positions in your Table of Organization that have been vacant for 6 months or longer:		
<b>Position Justification</b>		
Briefly summarize why this position is needed, as well as areas of revenue and savings.		
<b>Employee Impacted By This Change (if no one in position - leave blank)</b>		

Fiscal Data	
How will this position be funded (choose from drop-down list)?	
<b>PROJECTED 2023 EXPENDITURES</b> - Amounts must agree to amounts included in the proposed budget.	
Salary	\$ 68,931
Fringe Benefits	\$ 10,029
Travel/Training	\$ -
Supplies - IT	
Supplies - Other	\$ -
Purchased Services - IT	
Purchased Services - Other	\$ -
Capital Outlay	\$ -
<b>TOTAL EXPENDITURES</b>	<b>\$ 78,960</b>
<b>COST SAVINGS OR INCREASED REVENUES:</b>	
Please list below the additional revenues pertaining to this position and/or cost savings (reductions in expenditures) that will be shown in the budget.	
<i>Description</i>	<i>Dollar Value (enter as negative)</i>
Deleted Position (if applicable)	\$ (69,263)
	\$ -
	\$ -
<b>TOTAL COST SAVINGS/REVENUES</b>	<b>\$ (69,263)</b>
<b>NET COUNTY COST (Levy/Fund Bal)</b>	<b>\$ 9,697</b>
<b>PARTIAL YEAR FUNDING - ANNUAL PROJECTION</b>	
If you are requesting a position that will only be funded initially for a part of a year, please complete the following for annual (12 month) position cost:	
Salary	\$ -
Fringe Benefits	\$ -
Other Expenditures	\$ -
<b>TOTAL EXPENDITURES</b>	<b>\$ -</b>
Deleted Position (if applicable)	\$ -
Less Increased Revenue/Cost Savings (enter as negative)	\$ -
<b>NET COUNTY COST (Levy/Fund Bal)</b>	<b>\$ -</b>

TO BE COMPLETED BY HUMAN RESOURCES:	
Reviewed by HR	
County Executive Decision (Approved/Denied)	

## Deputy Veterans Service Officer

**Class Title**

Deputy Veterans Service Officer

**Class Code**

1700-2

**Salary**

\$60,465.60 - \$78,873.60 Annually

- DEFINITION
- BENEFITS

**Position Purpose**

As an accredited veteran's representative, this position aids in the administration of the veteran's services and provides assistance to veterans, their dependents and/or their survivors. The Deputy CVSO provides information to residents who are county veterans regarding benefits to which they may be entitled or help resolve any complaint or problem arising in or out of such service.

**Key Responsibilities**

The following duties are most critical for this position. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.

- Manages caseload distribution across Veterans Service team and assists Benefit Specialists with cases more complicated in nature.
- Interviews and advises veterans and/or dependents on eligibility for disability compensation, income based pension benefits, education benefits, death/burial benefits, and all other state and federal veterans' benefits. Prepares and submits applications for appropriate benefits.
- Supervises Veterans Office staff, coordinates office activities, allocation of personnel and workloads to ensure work is performed with accuracy and in a timely manner. The Deputy Veterans Service Officer is also responsible to evaluate the performance of direct reports.
- Assists the Veterans Service Officer with preparation of the annual operating budget and annual grant reporting to the WI Department of Veterans Affairs.
- Prepares department payroll documentation.
- Corresponds with various county, state, and federal offices, attorneys, cemeteries, funeral homes, medical personnel and the general public to obtain and provide necessary veteran information.
- Maintains accreditation with various Veterans Service Organizations and access to federal Veterans Benefits Management System (VBMS).
- Attends meetings or events outside of the office as directed by the Veterans Service Officer.

**Education/Certifications/Experience Requirements**

- High school graduate with at least five years of office experience working with MS Word, Excel, and Outlook.
- Minimum of three years' experience working with veterans programs such as; compensation, pension, education, and VA Health Care in a County Veterans Service Office or similar Veterans benefits processing position.
- Experience using Vetraspec software or similar Veteran case management software.
- Must have PIV card or ability to obtain PIV card within 12 months of hire.

**Required or Preferred Skills**

- Veteran status strongly preferred.
- Knowledge of pertinent laws, statutes, codes, regulations and terminology concerning veterans' benefits.
- Must have accreditation through as least one of many qualifying veterans' organizations (NACVSO, WDVA, VFW, DAV, and American Legion, etc.) to represent veterans' claims and appeals with the US Department of Veterans Affairs. Thereafter, must participate in continuing education to maintain accreditation.
- Ability to use current software programs to complete appropriate applications for clients.
- Ability to maintain confidentiality and manage time effectively.
- Experience in budget preparation and supply maintenance.
- Ability to deal effectively with various members of the public and coworkers. Assist coworkers with questions concerning computer programs, office procedures.
- Ability to work independently, make sound decisions, and use good judgment.
- Ability to lift, carry, push, pull, or otherwise move objects up to 50 pounds, understanding and utilizing proper body mechanics.

OUTAGAMIE COUNTY IS AN EQUAL OPPORTUNITY EMPLOYER. IN COMPLIANCE WITH THE AMERICANS WITH DISABILITIES ACT, THE COUNTY WILL PROVIDE REASONABLE ACCOMMODATIONS TO QUALIFIED INDIVIDUALS WITH DISABILITIES AND ENCOURAGES BOTH PROSPECTIVE EMPLOYEES AND INCUMBENTS TO DISCUSS POTENTIAL ACCOMMODATIONS WITH THE EMPLOYER.

## Justification for Sr. Benefits Specialist position

1. Based on the County Veterans Service Officer Position Description dated December 1, 2023, the main roles and responsibilities can really be summed up in the main duties of Strategic Leadership & Management; Veteran Outreach & Education; Case Management & Counseling; and Veterans Issue Advocacy. This position truly enables a team of Benefits Specialists (including Senior Benefits Specialists) to provide the face-to-face services our Veterans request. Although a CVSO can assist Veterans on a daily basis through appointments (required by State Statute 45-80), in Outagamie County, this becomes more of a secondary role to supporting and enabling the team. Each county will differ a little, especially smaller counties where there may only be one or two staff based on the Veteran population. I still enjoy meeting with Veterans, but have limited my appointments to two a day so I can also focus on the strategic side, especially with the PACT Act opening the door for approximately 5,000,000 more Veterans!
2. Looking at the Deputy Veterans Service Officer Position Description dated January 4, 2023, there is a greater shift to supporting Veterans; however, there are few specifics to include preparing payroll documentation, supervising all staff (except for CVSO), as well as assisting the CVSO prepare the budget and annual grant(s). There is limited leadership and I personally found it odd the Deputy would supervise the staff and perform the annual performance reports; with a staff of this few, I strongly feel the CVSO should execute those duties.
3. As important as the CVSO role is for strategic leadership & management, where the “rubber meets the road” falls within the scope of our amazing Benefits Specialists and Senior Benefits Specialists – they’re truly the superstars in my opinion! They’re the ones “in the trenches” with the Veterans, doing the deep dives into those clients’ lives, ascertaining what benefits are available. It’s truly a humbling moment when a Veteran applies for benefits, and when approved (up to a year later), returns to our office with great joy and exuberance; many times their lives are forever changed due to an unexpected additional tax-free income stream. Plus, more often than not, doors open for their families as well including education benefits and future benefits for a spouse (if they meet additional criteria).
4. The Senior Benefits Specialists are also the trainers. They work with the team to share their expertise and will often take on the more difficult cases like Pension & DIC Claims, taking hours of investment. Having two Senior Benefits Specialists allow for more one-on-one training with our Benefits Specialists to make them subject matter experts quickly and efficiently.
5. In my humble opinion, as long as the CVSO dedicates the majority of his/her time following outlined duties in the Position Description, enabling the team through training opportunities, tools, resources, and a healthy work-rest balance, the Veterans Service Office will run smoothly and efficiently. Transferring the 2-3 leadership and management tasks outlined in the Deputy’s Position Description to the CVSO should not add a significant workload and in fact, should better define the office structure and allow things to flow more smoothly overall. If at some point the staff loses confidence in the CVSO, they can then go directly to Human Resources for direction; there’s not an individual put in an awkward position as the Deputy who is between the staff and HR.
6. As the CVSO, I also want to ensure our team has opportunities to grow through leadership moments, community outreach, and perhaps even delve into supporting me in areas such as the budget, for instance. The more they know, the better they can support the Veterans and each other. In my absence, I have full confidence a Senior Benefits Specialist can step up and fill in for a short period of time in the event of my absence (e.g. vacation, training, etc.). As I work with

my team to develop a comprehensive training program based on my experience in the Air Force with training plans, the goal is essentially to allow anyone to grab a binder (physical or virtual), read step-by-step instructions, and with the support of the subject matter experts around the County, complete simple tasks (e.g. time sheets, P-Card reconciliations, payment vouchers, etc.). Nothing we do is very difficult with the right outline.

7. IF provided the opportunity to convert our part time position to a fulltime position, I would welcome either a Benefits Specialist or Senior Benefits Specialist. However, many counties are moving towards hiring Assistant CVSOs with the same requirements of military service as the CVSOs (WI State Statute 45.80). This position could be the step between a Senior Benefits Specialist and the CVSO, predominantly focusing on Veterans' needs (e.g. Senior Benefits Specialist roles) while still with a limited working knowledge of the CVSO duties and responsibilities in the event of a CVSO's absence. The only drawback is this limits the opportunity to only military Veterans whereas that requirement does NOT exist for Benefits Specialists. It could stifle upward movement in our specific office, at least temporarily. Again, with the proper training and continuity binders, any Senior Benefits Specialist should be able to fill in short term with limited challenges.

## Senior Veterans Benefits Specialist

**Class Title**

Senior Veterans Benefits Specialist

**Class Code**

1700-3

**Salary**

\$25.40 - \$33.14 Hourly

- DEFINITION
- BENEFITS

**Position Purpose**

This position initiates and presents claims for compensation, pension, entitlements and other benefits to the United States Department of Veterans Affairs and other agencies on behalf of veterans, their eligible dependents, and their survivors. Helping veterans and their dependents receive the benefits to which they are entitled.

**Key Responsibilities**

The following duties are most critical for this position. These are not to be construed as exclusive or all-inclusive. Other duties may be required and assigned.

- Conducts interviews with veterans and/or dependents to determine and complete the appropriate benefit forms and applications.
- Determines eligibility for veterans and family members of various programs such as education, grants, medical claims, disability claims, waiver requests, and nursing home applications.
- Corresponds with various county, state, and federal offices, the general public, and professionals to obtain and provide necessary information.
- Prepares, maintains, and updates program and department records, reports, confidential records and files.
- Trains new employees.
- Investigates and obtains Military Records, Discharge Documents and Military Medals and Ribbons.
- Participates in community outreach events.
- Order and replenish office brochures and VA pamphlets.
- Performs other duties as assigned.

**Education/Certifications/Experience Requirements**

- High school graduate or G.E.D. with relevant business classes, computer background, strong typing skills, and at least two years of general office experience.
- Active PIV Card preferred
- WDVA Accreditation preferred

- NACVSO Accreditation preferred

**Required or Preferred Skills**

- Working knowledge of Microsoft Office Suite.
- Excellent oral and written communications skills.
- Experience rendering advice and services to veterans and their families.
- Experience in administering Veterans Administration's policies, regulations and procedures.
- Veterans encouraged to apply

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FUND: GENERAL 100

COST CENTER NAME: VETERANS

DEPARTMENT NAME: VETERANS

COST CENTER NUMBER: 1008700, 1008800

**POSITION COUNT**

**REGULAR POSITIONS:**

**COST CENTER 1008700**

	2022		2023		2024		2025	
	FT	PT	FT	PT	FT	PT	FT	PT
DEPUTY VETERANS SERVICES DIRECTOR	1	0	1	0	1	0	0	0
OFFICE ASSISTANT	1	0	1	0	1	0	1	0
SENIOR VETERANS BENEFIT SPECIALIST	1	0	1	0	1	0	2	0
VETERANS BENEFITS SPECIALIST	2	1	2	1	2	1	2	0
VETERANS SERVICE OFFICER	1	0	1	0	1	0	1	0
<b>COST CENTER TOTALS</b>	<b>6</b>	<b>1</b>	<b>6</b>	<b>1</b>	<b>6</b>	<b>1</b>	<b>6</b>	<b>0</b>
<b>TOTAL POSITIONS - REGULAR:</b>	<b>6</b>	<b>1</b>	<b>6</b>	<b>1</b>	<b>6</b>	<b>1</b>	<b>6</b>	<b>0</b>

**TEMPORARY POSITIONS:**

**COST CENTER 1008800**

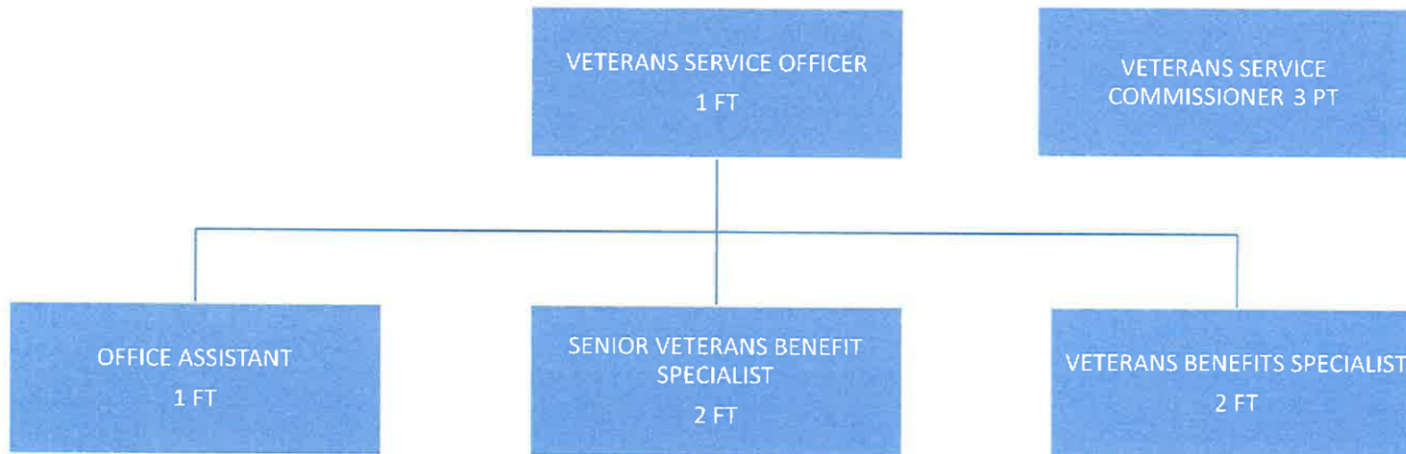
VETERANS SERVICE COMMISSIONER	0	3	0	3	0	3	0	3
<b>COST CENTER TOTALS</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>3</b>
<b>TOTAL POSITIONS - TEMPORARY:</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>3</b>
<b>TOTAL ALL POSITIONS:</b>	<b>6</b>	<b>4</b>	<b>6</b>	<b>4</b>	<b>6</b>	<b>4</b>	<b>6</b>	<b>3</b>

FUND: GENERAL 100

DEPARTMENT NAME: VETERANS

COST CENTER NAME: VETERANS

COST CENTER NUMBER: 1008700, 1008800



**OUTAGAMIE COUNTY FISCAL NOTE**

**INTRODUCTION:** This form must be attached to any resolution or ordinance which contains a spending or revenue proposal. The form should be completed by an individual within the department initiating the resolution or ordinance with assistance from the Financial Services Department. Contact the Finance Director (1674), Controller (1675) or Staff Accountant (1681) for assistance. Once completed, forward a copy of the form to the Financial Services Department for their review. Financial Services will forward a reviewed copy of the fiscal note to Legislative Services.

1. **Subject:** Request for transfer from contingency – Veteran’s Services

2. **Description:** This section must be completed for all fiscal notes. Briefly and concisely describe the request. State assumptions used and discuss any current year and long-term fiscal impacts. (A separate attachment can be used)

The Veteran’s Service is requesting contingency funding for a change of position. The Department would like to eliminate the position of Deputy Director and add a Senior Benefits Specialist as the need is for a more public facing position. The position will be filled by an existing employee and as such will increase salaries by \$2,551 and benefits by \$433 for a total of \$2,984. Funding will come from contingency.

**Current Year Budget Impact (Check one or more of the following boxes)**

Revenues                       Expenses (Cost)                       None

- 3. Is the specific cost or revenue included in the current year’s budget?                      yes ( )    no ( x )    partially ( )
- 4. If the proposal requests additional spending, can the additional cost be absorbed within the current year’s line item?                      yes ( x )    no ( x )    n/a ( )
- 5. Is the proposal to accept additional revenues only?                      yes ( )    no ( x )
- 6. Does this request modify/adjust the current year budget?                      yes ( x )    no ( )  
If no, skip to question 8 below.

7. Detail current year budget changes. Please list cost center name, line item, account number and either the increase or decrease amount. (Please note that all budget adjustments must balance. For example, an increase in an expenditure account must be offset by a decrease in another expenditure account or the contingency fund or an increase in a revenue account or other funding sources such as fund balance applied.)  
The project on

COST CENTER NAME	LINE ITEM (i.e. Salaries, Supplies, Etc.)	ACCOUNT NUMBER INCLUDING COST CENTER (i.e. 1004100.5100, 1004100.5400, etc.)	INCREASE (DECREASE) AMOUNT
Veteran’s Service	Salaries	1008700.5100	\$2,551
Veteran’s Service	Fringe Benefits	1008700.5200	\$433
Reserve for Contingency		1002247.5500	(\$2,984)

**Annual and Long-Term Impact**

8. Is the above Increase/Decrease a nonrecurring one-time expense or revenue?                      yes ( )    no ( )    n/a ( )

9. What is the anticipated annual and/or long-term cost or revenue impact?                      Annual Cost                      \$9,697  
Annual Revenue                      0

Fiscal Note Prepared by: Valarie Wunderlich/Michelle Uitenbroek

For Financial Services purposes only	
Reviewed By:  <i>Michelle Uitenbroek</i>	If expenditures are recorded in the financial system at a level of detail lower than the level 6 as shown above, indicate the specific account numbers and amounts below: <u>Detail Expenditure Account Number</u> <u>Amount</u>
Date: September 30, 2024	_____
Comments:	