

Date: November 12, 2021  
To: Joseph Parisi, County Executive  
From: Katherine Kroll, Real Estate Specialist  
Subject: Real Estate Specialist Reclassification Appeal

Dear Mr. Parisi:

I would like to appeal the denial of reclassification for the Real Estate Specialist position. The analyst's assessment of the position does not adequately reflect the responsibility and importance the role has gained since the last position review in 2009.

When I was hired as a Real Estate Specialist in 2013, it was under the expectation that the position would have significant responsibility. The role was and still is a vital part of the document-recording process, and has sole responsibility for accounting of the real estate division of the office. However, it was also understood that there were levels of authority above the position who would make office policy, and advise the Specialists of changes to enact in the daily workflow. The Register of Deeds, the Chief Deputy, and the Lead Real Estate Clerk all actively made those decisions. The Real Estate Specialists were consulted at times, but were ultimately not the deciders. Issues of defining indexing rules, office processes, scheduling, and more were not the purview of the position.

In 2015, the retirement of the incumbent Lead Real Estate Clerk (G-16) left a vacancy for the position. There was considerable interest from all the incumbent Real Estate Specialists for that opening. Instead of filling that role, the Register of Deeds decided to shift the role's responsibilities onto the Real Estate Specialists. We took on the duties of the G-16 position, without additional compensation. This caused a significant shift in the importance of the Real Estate Specialist to the department.

There were many duties of the Lead Real Estate Clerk that shifted to the Specialist role, but the biggest changes that came from these additional responsibilities were training and supporting Real Estate Clerks, and becoming part of the decision-making authority for department policy. Our position has evolved from a simple part of the recording process, to overseeing the entire process. This shift has caused the position to become essential to the daily operation of the department, to the point that the department cannot function without us.

Training Clerks:

Prior to 2015, the training and oversight of the Real Estate Clerk position was the sole responsibility of the Lead Real Estate Clerk, a G-16 position. These duties are a demanding time commitment when a new employee is hired, as the training process for a new Clerk takes months. Ongoing training and support of the Clerks continues to divert attention from the daily recording workflow. When these duties were assigned to the Real Estate Specialists, we took

that demanding time commitment into our already demanding workflow. We have managed to succeed because we are able to trade and share these tasks daily, rather than commit one Specialist to the entire training process. With more hands and different training styles available, our Clerks are able to learn their positions more effectively than they would with a single source of information.

Office Policy:

After the Lead Real Estate Clerk position was eliminated, the Register of Deeds and Chief Deputy have increasingly sought advice from the Real Estate Specialists concerning document recording and office policy. The Specialists are the "eyes on the ground" and can identify and address potential issues more quickly than the supervisory roles. One example is with the image quality of documents submitted. As the rise of electronic recording continues, the Specialists were first to notice the legibility of submissions was becoming an issue, and a firmer policy for document acceptability was created.

We are also a position that constantly interacts with stakeholders in the community, and as such are most aware of the issues that affect the community at large regarding real estate records. We are in daily contact with attorneys, lenders, developers, and property owners. Our knowledge of their concerns and frustrations with real estate records focuses our priorities, and we can now adjust office workflow accordingly.

Scope of Position:

Over the years, the Real Estate Specialist position has become essential to the daily functioning of the Register of Deeds department. A Real Estate Specialist must review every real estate document submitted for recording before it can pass to a Clerk for further processing. If none of us are at work for a day, the entire real estate division cannot work, and real estate documents are not added to the public record. If this continues, and documents are not recorded, then stakeholders in the community (lenders, title companies, etc.) cannot trust the accuracy of the public record, and they would become more reluctant to issue mortgage financing and schedule title closings. The economic stability of the county would be severely at risk if the real estate market was unable to proceed forward. With this snowball effect on the economy, there is no doubt that our position is one of importance.

In closing, I respectfully appeal the determination made regarding the Real Estate Specialist reclassification. I look forward to further communication with your office, Employee Relations, and Reclassification Appeals Board.

Sincerely,



Katherine Kroll  
Real Estate Specialist  
Dane County Register of Deeds

November 12, 2021

Joe Parisi, Dane County Executive

Subject: Reclassification Decision Appeal

Dear Mr. Parisi,

I am writing to appeal the decision to deny the reclassification of the Real Estate Specialist from a G-15. I feel the decision to deny a reclassification of this position does not accurately reflect the additional responsibilities added to this position since the creation of the position in 2009.

Since the creation of this position in 2009, additional tasks and responsibilities have been added to the position description. Some of the additional added responsibilities since the creation of this position include all training of subordinate staff, coordination of workflow, payroll responsibilities, oversight of staff accuracy/data entry, and improvement and restoration of historical document images.

I also believe there are some inaccuracies in the position audit resulting in the reclassification denial.

- The analyst states that Dane County has historically separated lead workers and subordinates by two (2) pay ranges as a reason for denial. In the Register of Deeds office at the time this request was submitted, the Lead Vital Records Clerk is a G16 classification overseeing the Register of Deeds clerks in Vital Records (G13), so this separation seems to not always be a requirement in the county. Another example of this is the Lead Economic Support Specialist at a G19, while an Economic Support Specialist is a G15 (4 pay ranges).
- The denial uses position comparisons of Jail Clerk and Probate Clerk to show that the tasks required for our position are comparable to other G-15 positions, and that five years of relevant experience are required for these positions versus three years for a Real Estate Specialist position. The comparison of job duties could easily be made to other higher classifications that would lead to our reclassification being approved versus denied.

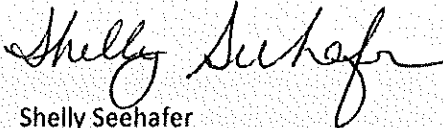
The Jail Clerk requirement is for five years of general clerical experience, whereas a Real Estate Specialist requires any combination of training and experience equivalent to three years of clerical experience including one year of substantial involvement with a wide variety of documents related to real estate, emphasizing the importance of specialized knowledge in this position.

The request for reclassification used the Accounting Assistant and Land Records Analyst job classifications as accurate comparisons of the higher-level thinking skills and responsibility for decisions that the Real Estate Specialist needs to have, especially since the Lead Real Estate Clerk position was eliminated in 2015. The HR analyst instead chose to focus on the more "every day" tasks to compare the position to Jail Clerk and Probate Clerk. I believe the omission of the aspects of our job that require the use of initiative and judgment does a disservice to the complex and important legal and financial decision making that is required of our position every day.

The Real Estate Specialists fill a role of vital importance for Dane County – failure to accurately complete our job requirements would have tremendous implications for the county ownership and tax records, as well as having effects on banking, real estate sales, and the transfer tax revenue included in the county budget. Many other county departments rely on the accuracy of our records. I hope these factors are considered in the appeal of the Real Estate Specialist reclassification.

I respectfully request that this appeal be scheduled for consideration before the Reclassification Appeals Board at your earliest convenience, and let me know when this will appear on their agenda. Thank you.

Sincerely,

A handwritten signature in cursive script that reads "Shelly Seehafer". The signature is written in black ink and is positioned above the typed name.

Shelly Seehafer  
Real Estate Specialist  
Dane County Register of Deeds

November 11, 2021

To: Dane County Executive Joe Parisi

From: Tracy Gibbs, Real Estate Specialist, Register of Deeds

RE: Reclassification Denial

I respectfully request an appeal of the denial for the reclassification of the Real Estate Specialist position.

I don't feel that the Analyst had a true understanding of the importance of the Register of Deeds office and its impact. The Register of Deeds office is more than just the library to which all other industry partners rely on for complete and accurate records. The records kept in the Register of Deeds office are vital to the economy of our county and state. The integrity of the records held in this office are essential for State and local government's tax assessments. The Department of Revenue real estate transfer fees are verified and collected by the Register of Deeds office. Real estate offices and title companies must rely on our records for a complete title history, accurate descriptions, and boundaries and rights, to enable the sale and transfer of all property. All claims for and against property are kept by the Register of Deeds office. If the Register of Deeds office doesn't function with a high level of accuracy and integrity, the impact to the economy is greatly affected. When one focuses on the financial aspects of government, it can be argued that the operation of the entire county government depends upon the Register of Deeds office. Taxation of real property is the cornerstone of financing local government operation.

As a Real Estate Specialist, we have the responsibility of the acceptance all legal documents that are submitted to recordation. A Real Estate Specialist must have an extensive understanding of both state statutes and local ordinances as they relate to the acceptance and record ability of real estate documents. Once a document is recorded in the Register of Deeds office it becomes a permanent part of the record, only to be removed by court order.

The Real Estate Specialist is also a fiduciary of funds for many agencies. We collect and reconcile recording fee, transfer fees for all local and state agencies. These fees have a great impact on the county budget as well as the state budget. Real estate specialist must also manage and be accountable for hundreds of escrow accounts.

The position of Real Estate Specialist has the designation of \*\*\*promotional recruitment only, this was facilitated because of the specific experience and knowledge with real estate, state statutes, the land records within the office of the Register of Deeds that is required to perform these job duties.

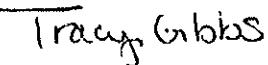
The Real Estate Specialists have complete control of the workflow within the Register of Deeds office. All documents and fees must be reviewed by the Specialists. If there were an instance where no Specialist could come to work, nothing would be recorded and the real estate clerks would have not documents to index.

I have been a Real Estate Specialist since August 2015, there have been many changes to this position since that time. Our technology and software have had many changes and upgrades, as specialists we are expected to be the facilitators of these upgrades with both onsite and offsite training. When changes to State Statutes are made, it is the responsibility of the Specialists to implement how these changes effect the procedures within our office.

Since 2009, specialists have had completely different levels of responsibilities, job duties and consequence than real estate clerks. Not only have our very unique responsibilities and duties had many changes since 2009, we as specialists have also acquired the responsibilities of 2 different lead positions that have been eliminated.

I would ask for reconsideration of the reclassification of the Real Estate Specialist position based on the significant changes and responsibilities that have been made to this position since it was created in 2009.

Respectfully submitted,

  
Tracy Gibbs  
Real Estate Specialist

11 November 2021

To: Joe Parisi, Dane County Executive

From: John Pope Jr, Real Estate Specialist, Dane County Register of Deeds

Re: Denial of Reclassification

Dear Mr. Parisi,

I am writing to appeal the denial of the reclassification of the Real Estate Specialist position.

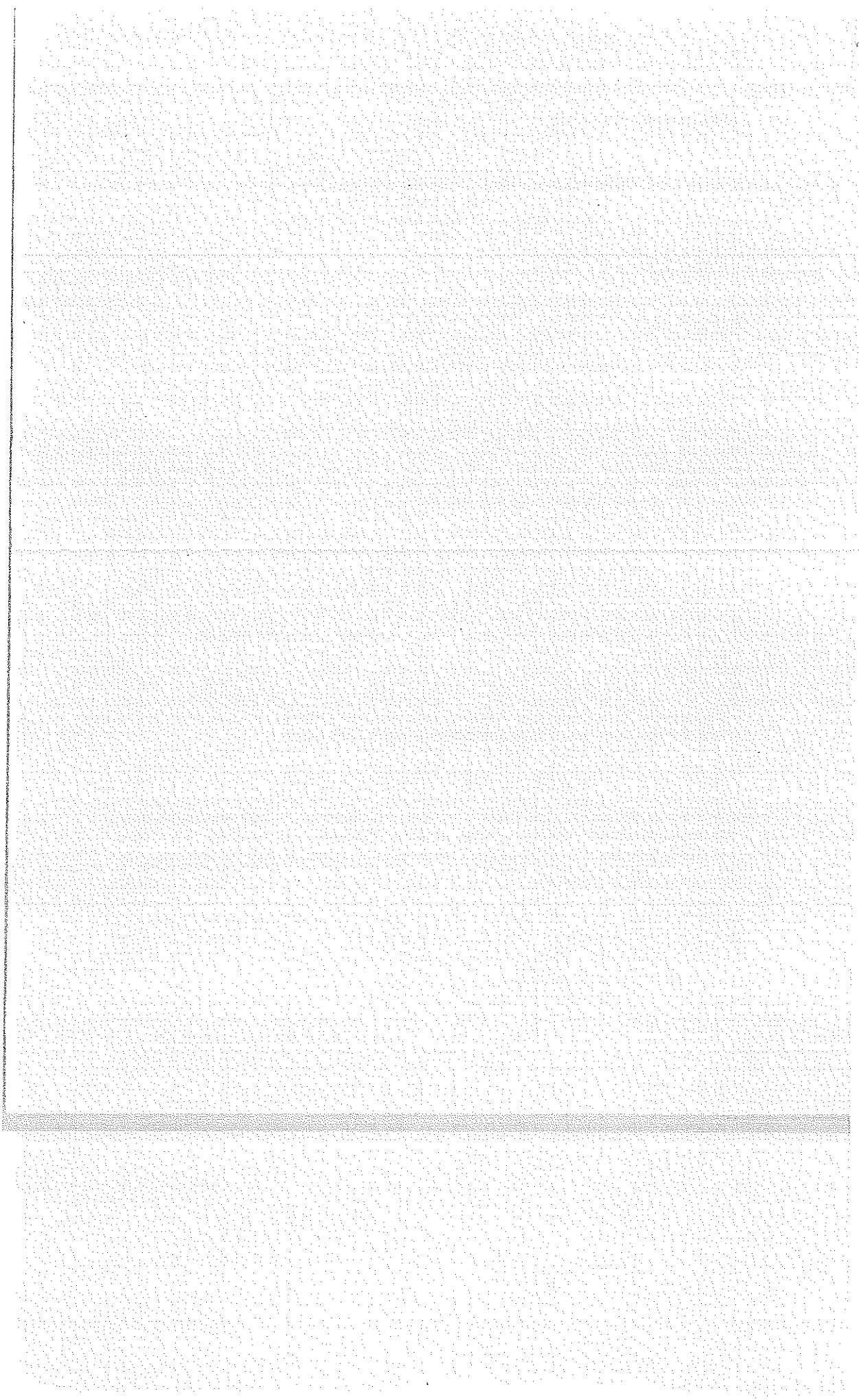
I was promoted to Real Estate Specialist on October 14, 2018. Prior to that, I worked as a Real Estate Clerk, starting with the county in that position in June of 2006.

As a Real Estate Clerk, I was taught the importance of accuracy in indexing documents so that they could be searched for, posting them accurately so that they would be mailed out with the correct document numbers stamped on them, working with customers to find records who often would have limited information to assist in the search, and other duties that all involved attention to detail and often a lot of patience. I enjoyed the challenges of the job and working with customers who were both homeowners, title company employees, attorneys, surveyors, and bank employees. There was a routine and the clerks would rotate people to work at reception and to post the documents, as well as the ongoing tasks of answering phones and processing and responding to other things like copy requests and special projects.

When I began training in my new position as a Real Estate Specialist, I was taught the basics of the job, like checking in title companies and the mail and preparing documents for processing/posting by marking up the documents as required and scanning them into our database. I continue to learn more about the job nearly every day.

As specialists, we make the calls on whether documents are recordable or if not, what they need in order to be recorded. We also must navigate complicated computer applications that often are upgraded and must be relearned. We must coordinate with submitters when they make errors on transfer receipts, especially when the conveyance date is in the future and is therefore invalid, which means we cannot finish the daily bookkeeping to the Treasurer until we receive a corrected receipt.

The job involves a lot of multi-tasking and stress from being at the end of the line to ensure that everything balances and is accurate. We are the face of the office when it comes to receiving documents, plats, and certified survey maps which often come with special instructions that we must convey to others accurately.



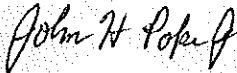


Mr. Hauri's point that comparable G-15 positions require 5 years of relevant computer experience while the Real Estate Specialist position requires only 3 years doesn't seem terribly relevant. I was required to pass a real estate exam and have experience in real estate when I was first hired and would not have been hired as a specialist without having the background I had. I would guess that I have about 30+ years of clerical experience and that the other specialists also have many more years of experience than the minimum required. This position can be difficult to fill and sometimes for that reason you lower some of the standards to get more applicants to apply.

He also says that the lead real estate clerk was 2 levels above the real estate clerks whose work she oversaw so it is appropriate that we be 2 levels above them as well. I would point out that the lead real estate clerk was a training position and did not have other tasks she was responsible for beyond monitoring the work being done, whereas we have full time jobs in addition to providing guidance and training.

When I became a Real Estate Specialist, my pay increased by .40 an hour from what I was being paid as a Real Estate Clerk. I'm not suggesting that a .40 an hour raise is insignificant, but had I understood all of the additional duties and responsibilities I would be taking on, I'm not sure that I would have wanted to leave a job I was very comfortable with for that amount of compensation. I feel that if the ultimate decision is that G-18 is not warranted that we might be bumped up to a level somewhere above G-15.

Sincerely,



John H. Pope Jr.

