

STATE OF WISCONSIN  
DEPARTMENT OF ADMINISTRATION  
DIVISION OF PERSONNEL MANAGEMENT  
DOA-15318 (C07/2015)  
STATS. 230.09 WIS. STATS.  
PREVIOUSLY OSER-DCLR-86



COMPENSATION & LABOR RELATIONS  
101 E. WILSON ST, 4TH FL  
MADISON, WI 53703

## Confidential Exclusion Analysis (Non-Supervisory Positions)

This analysis should be completed by the position's supervisor and reviewed by the agency human resources representative prior to classifying a position as "confidential." The information will be used to assist in determining if the position is performing confidential duties which support inclusion of the position in a confidential classification, resulting in exclusion of the position from bargaining unit representation.

Wisconsin Statute s. 111.81(7) excludes from the definition of employee for collective bargaining purposes "individuals who are privy to confidential matters affecting the employer-employee relationship . . ." Under s. 111.825(3), Wis. Stats., the Wisconsin Employment Relations Commission (WERC) assigns eligible employees to the appropriate statutory bargaining unit and ultimately determines appropriateness of confidential exclusions. Through case decisions, the WERC has developed the following criteria to determine if an individual should be excluded on the basis of being confidential. The criteria should be used to determine if a position may appropriately be classified as confidential.

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### Position Identification Data

1. Name of Employee (if filled): \_\_\_\_\_
  2. Civil Service Classification: \_\_\_\_\_
  3. Department and Division: \_\_\_\_\_
  4. Bureau, Section, and Unit (or comparable): \_\_\_\_\_
  5. Name and Classification of Supervisor: \_\_\_\_\_
  6. Name and Complete Civil Service Title of Former Incumbent (if any): \_\_\_\_\_
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7. Does the position have access to, knowledge of, or participate in matters which deal with: [If the answer is Yes, please list the corresponding position description (PD) task statement(s) next to the response below.]

**PD Task #s**

- |  |                |       |
|--|----------------|-------|
| a. the employer's strategy or position in collective bargaining?   | Yes ___ No ___ | _____ |
| b. contract (labor agreement) administration, which may include grievance settlements or interpretation of contractual language?           | Yes ___ No ___ | _____ |
| c. information being gathered in preparation for litigation of labor relations issues?   | Yes ___ No ___ | _____ |
| d. other similar matters pertaining to labor relations and grievance handling between the bargaining unit representative and the employer? | Yes ___ No ___ | _____ |
| 8. Is the information the position has access to available to the bargaining representative or its agents?                                 | Yes ___ No ___ | _____ |
| 9. Are there other confidential employees available to perform the confidential tasks?   | Yes ___ No ___ | _____ |

(over)

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DOA-15318 (C07/2015) CONTINUED

### Confidential Exclusion Analysis

For a position to be confidential, a “yes” answer is required in at least one of the questions listed under number seven (7a through 7d), and a “no” answer is required in both questions eight and nine. If the answer to question number nine is “yes,” then the possibility of consolidating confidential tasks should be discussed with the agency’s management.

A signature below means the position has been reviewed and you have concluded it should be confidential as defined by s. 111.81(7)(a), Wis. Stats.

Supervisor \_\_\_\_\_ Date \_\_\_\_\_

Human Resources Representative \_\_\_\_\_ Date \_\_\_\_\_