



JOB DESCRIPTION QUESTIONNAIRE (JDQ)

SECTION 1 - DEMOGRAPHIC INFORMATION						
Class Title		Treasurer	Department	Treasurer	Division	NA
		<input checked="" type="checkbox"/> Executive (City Officer or Department Head) <input type="checkbox"/> Managerial Service <input type="checkbox"/> Deputy/Assistant Service <input type="checkbox"/> Supervisory <input type="checkbox"/> Professional <input type="checkbox"/> Confidential <input type="checkbox"/> General Employee			Work Location	<input checked="" type="checkbox"/> City Hall <input type="checkbox"/> Fire <input type="checkbox"/> Health <input type="checkbox"/> Library <input type="checkbox"/> PW <input type="checkbox"/> Police
Full-Time / Part-Time		<input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time, Hours per week 40+ ____	Supervisor Title	City Administrator		
HR Only	Working Title	Same	Salary Grade -	N	FLSA Code:	<input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non-exempt
Position Summary – Summarize the purpose and primary responsibilities for this position. (Job Announcement Wording)						
Under the general direction of the City Administrator, is responsible for the performance of all duties described in in 62.09 (9) Wis. Stats., property tax billing, collection of city revenues, investments and cash management, banking, and customer service center oversight. The incumbent regulates the administration of the department budget and related funds and assets. Work is performed with broad latitude indecision making within regulating state statutes and City ordinances. Performs other work as requested or assigned. Provides leadership and development for department employees						
SECTION 2 - DESCRIPTION OF EXPECTED WORK HOURS/CORE FUNCTIONS, ESSENTIAL DUTIES & RESPONSIBILITIES						
The core functions/essential duties/responsibilities of the job, which are the most important aspects of the job. This section is focused on WHAT is done rather than HOW it is done. Wording that provides a clear for someone not familiar with the work is used. Terminology or acronyms that are not widely known are avoided. The list includes the duties that are most important at the top, and the estimated percentage of the total annual time that each item takes. (FYI - 10% equates to roughly 200 hours of a work year.) Duties and responsibilities that account for <u>as close to 100% of work time as possible are listed</u> . Catch-all categories may be included but are not evaluated as part of the classification for the position (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]						
Expected Work Hours/Core Functions/Essential Duties and Responsibilities of the Position					Frequency	% of Annual Total Time
Expected Work Hours		<input checked="" type="checkbox"/> Normal Business Hours (M-F, 7 am- 3:30 pm); but may work alternative schedules as required <input checked="" type="checkbox"/> Full-time salaried position ¹ <input checked="" type="checkbox"/> Emergency call outs, before and after standard scheduled hours of work including weekends and holidays <input type="checkbox"/> Watch Duty <input checked="" type="checkbox"/> Other, describe: Attendance at Common Council Meetings, Standing Committee Meetings, Plan Commission, Downtown Business Improvement District meetings and events, and other events or meetings outside out normal work hours may be required Regular attendance is an essential function of this job to ensure continuity of service delivery.				
Property Tax Billing-Preparation/Creation and Collection of the City’s 20,000 Real Estate and Personal Property Tax Bills. Coordinate and process timely tax settlements with other taxing jurisdictions. Handles final annual settlement of delinquent real estate tax bills with Milwaukee County in August of each year. Collect and					Daily (D)	10%

¹ with expectations for coverage during core business hours and flexibility required as necessary to accommodate business needs. Accessible by cell phone and/or to report to the worksite outside of regular office hours, including but not limited to, nights, weekends, holidays, etc.

deposit Room Tax. Manage City Council approved current and/or deferred special assessment ledger including payment, or placement on tax roll. Apply Lottery and Gaming, First Dollar Credits to tax bills.		
Supervise and control the daily collection of all City revenues. Ensure that revenues are properly accounted for and recorded monthly within the respective accounts by fund. Monitor, organize, execute, and account for monthly cash and investment transactions for all bank and investment accounts. Explain and/or define Treasury operating procedures or policies to property owners, developers, department/division personnel and elected officials. Plan, organize, administer, and coordinate cash collections for billing activities and report results. Maintain proper internal control procedures for cash and investment activities.	Daily (D)	15%
Investments & Cash Management: Estimate, monitor, and report on cash flow and transfer of funds between investment accounts to maximize investment earnings. Determine the daily cash needs of the City. Adjust investment pool balances and other investment accounts to meet cash needs of the City. Allocate daily idle funds to either short-term (money market accounts or daily repurchase agreements with the bank) or longer-term investments. Monitor investment maturities and insure these funds are promptly deposited to the City's custodial accounts. Compute interest income for all investments and properly record revenues to corresponding funds within the City's ERP software solution. Oversee accounting in portfolio tracking and general ledger software applications by fund, including "to-market" adjustments. Act as liaison with banking and brokerage officials.	Daily (D)/Weekly	10%
Banking: Administers all bank/investment accounts on the City's behalf. Reconciles Bank Statements monthly. Responsible for processing fund transfers between bank accounts, wire transfers, and ACH payments as needed for tax payments, debt payments, investment transactions, and other transactions as needed.	Daily (D)/Weekly	10%
Perform all duties as described in 62.09 (9) Wis. Stats. Compile information for and file required state reports; including Room Tax Report (SL-304), Request for Sharing Non-Manufacturing Omitted Taxes (PC-205) – if needed, January settlement tax roll general property taxes only (real and personal), Statement of Taxes, etc., and information for Financial Reporting & Audit: Assist with preparation of quarterly financial reporting to Common Council. Assist outside auditors with year-end audit.	Annual/Quarterly	10%
Assists the Finance Department with accounting, budgeting, and analysis, as necessary. Year-end account closings and reconciliations as required for annual audit.	M/D/A	15%
Supervision & Customer Service: Supervise the Customer Service Center Staff and Treasurer's Office employees. Assist customers with questions and resolves disputes with citizens/customers. Train staff on cash handling and collection procedures, software, and service to citizens/customers. Consider and implement process improvements to enhance customer service and improve efficiency.	Daily	20%
Responds to public inquiries and provides information on property taxes, assessments, property descriptions, City records, ordinance information, and City Council agendas. Attend department meetings, Common Council meetings, committee meetings, and other city functions as needed. Work with other departments to assist with efficiency initiatives, Lean process analysis, and other management initiatives to provide the best possible service to other city departments, committee members, citizens, and employees	N	5%
Lead software implementations, updates, and troubleshooting for online payments, credit cards, cash, and investments tracking and property tax bills and revenue collections.	N	5%

SECTION 3 - COMPETENCIES, KNOWLEDGE, SKILLS AND ABILITIES		
Accountable	Responsive to the community's interests and needs; timely; dependable; consistent; answerable; effective in the use of resources; adheres to established policies and procedures as appropriate; able to justify decisions and actions.	
Driven	Goal oriented, creative in problem solving; exhibits initiative: sets and pursues high standards; motivated to succeed.	
Dedicated	Demonstrates service to others; is customer focused; displays cultural competency and professionalism.	
Integrity	Sincere, honest, trustworthy, and ethical; models values and embodies competencies.	
Technical	Has and grows knowledge and skill in area of expertise; is competent and proficient in the use of available technology); develops cross-functional	

	skills.
United	Encourages and exemplifies teamwork, positive attitude, and emotional intelligence; is an effective communicator, tactful and diplomatic; mentors others; regularly gives and receives feedback.
Progressive	Strategic, innovative, skilled in change management and agile; challenges the status quo; explores and drives continuous improvement opportunities.
	<ul style="list-style-type: none"> • Recommend changes in procedures and processes to improve efficiency; • Support initiatives such as strategic planning, LEAN, and innovation; • Maintain prompt, predictable, and regular physical attendance; • Provide truthful and accurate written and verbal communications; • Process the knowledge, skill and ability to meet physical demands and requirements, effectively function in the work environment and efficiently utilize the tools listed in Section 7 at the proficiency levels listed. <p><i>If checked the following are applicable to the position:</i> <input type="checkbox"/> maintains the ability to competently and credibly testify in court; <input type="checkbox"/> maintains ability to lawfully operate designated motor vehicles at all times when driving duties are performed; <input type="checkbox"/> maintains the ability to travel throughout and enter all different properties in the jurisdiction</p>

Job Specific	List the desired knowledge, skills, and abilities needed to be successful in performing the position (e.g., knowledge of local government organization and administration; skill in listening, critical thinking, problem analysis and problem-solving; ability to quickly adapt and learn specialized software systems and databases)
	Knowledge of related laws, rules, regulations and duties for the position of City Treasurer and municipal financial management including investment of funds, accounting, and record keeping.
	Knowledge of the City Code and State Statutes governing the collection of taxes and special assessments.
	Ability to perform mathematical calculations and maintain accurate and complete records and files.
	Ability to work as an effective team member to assure the effective and efficient service delivery.
	Ability to multi-task on a daily basis, performs with telephone and walk-in customer interruptions, and adapt to changing priorities.
	Knowledge of the City's ordinances, rules, regulations, and policies.
	Ability to coordinate a wide range of activities and programs. Ability to plan, assign, direct, and evaluate the work of subordinates.
	Ability to make complex decisions and interpretations in accordance with established rules, policies, and procedures.
	Ability to establish and maintain effective working relationships with fellow employees, superiors, subordinates, city officials and the general public.
Ability to communicate information tactfully and impartially. Ability to communicate clearly, orally and in writing.	
Skill in dealing courteously and effectively with the public. Ability to handle reasonably necessary stress.	
Regular attendance is an essential function of this job to ensure continuity of service delivery.	

SECTION 4 - JUDGMENTS / DECISION-MAKING

Five of the most typical judgments/decisions made in performing the job as well as the solutions to these problems, and the resource, input or guidance others provide in arriving at the decision. Who reviews if anyone.

Typical Problems/Challenges	Possible Solution(s) to Problem/Challenge	Resources Available and/or Used	Job Title of Who Reviews
Citizens do not want to pay interest and penalties on their bills	Can waive the full amount, a portion or can say no	Reason for late payment, previous payment history, city policies, state statutes	N/A
Where to invest excess city funds	Can invest in CD's, Money Markets, Bonds, or keep in checking account	City and State investment policy, information supplied by brokers, current and future cash needs	Collaborate with Finance Director
G-L Account reconciliations	Correct entries that were made in error	Research entries within account, research backup paperwork and discuss with employee who entered the Journal Entry	N/A
Staff in departments need financial analysis/information	Query accounting system for data,	Previous revenue trends, and	Collaborate with

	analyze available financial data, provide summary of financial information and work with staff in departments to ensure understanding.	increases	Finance Director
Inaccurate, incomplete information provided by other city departments or policy or procedure is not being followed	Change the policy to fit better to the job, discuss with the employee why the policy or procedure is not being followed	Explore the current policy/procedure, Research industry standards, Research other options to perform the specific tasks	City Administrator

SECTION 5 - WORKING RELATIONSHIPS / INTERACTIONS / CONTACTS Typical work relationships with persons inside or outside of the City of West Allis.

Title of individuals with whom this position typically interacts	Interaction Description.	Why is it necessary?
Citizens	Daily questions/complaints regarding bills or general inquires	To provide the accurate and timely customer service to our citizens
Department Heads	Answer questions regarding billing and collections and other general questions	To assist other departments in the efficient operation of their department and proper accounting of department operations
Common Council	Answer questions regarding resolutions or communication for the Treasurer Department	To inform the Common Council and other Committee members facts and other information to allow them to make effective decisions
Treasurer Office Employees and Customer Service Center Employees	General supervisory role— training & customer service	To have a proper and active supervisory role for daily treasury functions, cash collections, and Customer Service Center

SECTION 6 - EDUCATION, EXPERIENCE, CERTIFICATION, LICENSURE, TRAINING REQUIRED²

Education	<input type="checkbox"/> Less than High School <input type="checkbox"/> High School/GED <input type="checkbox"/> One Year Certificate <input type="checkbox"/> Associate degree <input type="checkbox"/> Bachelor's Degree <input type="checkbox"/> Master's Degree <input type="checkbox"/> Professional Degree (Engineering, Law, Library, Medicine Nursing, etc.) Field of Study: Business Administration, political science, law or related field Additional Information (e.g. specific coursework, etc.):
Experience	<input type="checkbox"/> No Experience <input type="checkbox"/> < 2 yr. <input type="checkbox"/> 2 to 3 yrs. <input checked="" type="checkbox"/> 4 to 5 yrs. <input type="checkbox"/> 6 to 7 yrs. <input type="checkbox"/> 8 to 9 yrs. <input type="checkbox"/> 10 to 11 yrs. <input type="checkbox"/> ≥ 12 yrs. Describe Specifics regarding required experience (e.g. 5 total years of customer service experience 2 of which were in a supervisory capacity): Experience working in a municipality as a <i>municipal clerk</i>

Required Certification/Licensure/Training ³	How Attained/Provided	Required Upon Hire?	May Obtain After Hire?
Driver's License	Self	<input checked="" type="checkbox"/>	<input type="checkbox"/>
National Incident Management System's (NIMS) ICS-100 and 700 training	Provided by City	No	<input checked="" type="checkbox"/> (within 6 months)
CPA (or MBA may substitute)	City pays annual certification	CPA or MBA	
Lean/Six Sigma Training, Preferred	Provided by City	Preferred	<input checked="" type="checkbox"/>
Certified Municipal Treasurer of Wisconsin (CMTW),	Employer pays training	Preferred	Yes

² Equivalencies are used where deemed appropriate with regard to education and experience requirements. Combinations of education and experience which are likely to lead to success with essential duties and responsibilities are considered. Generally 2 years of relevant experience may be substituted for each year of education. This does not apply to required professional degrees, licensures, or certifications (e.g., juris doctorate, public health nurse, etc.). If Equivalency was indicated for Educational requirements, it should be taken into consideration when determining work experience requirements.

³ including but not limited to: valid WI Driver's License, valid WI Commercial Driver's License [CDL], confined space training, blood borne pathogen training, etc.

Describe any current practices as it relates to licensure or certification (e.g. extra pay for certification, employer payment for obtaining or renewing, etc.):
 The City of West Allis will pay for certifications directly related to job duties.

List preferred Education, Experience, Certification, Licensure or Training –

SECTION 7 - SUPERVISION / MANAGEMENT

A. Supervision Received by this position upon successful completion of a training period:

- Close Supervision:** Assigned duties according to specified procedures and receives detailed instructions. Work is checked frequently.
- Supervision:** Performs a variety of routine work within established policies and procedures, and receives detailed instructions on new projects and assignments.
- General Supervision:** Normally receives little instruction on day-to-day work and receives general instructions on new assignments.
- Direction:** Establishes methods and procedures for attaining specific goals and objectives, and receives guidance in terms of broad goals. Only the final results of work are typically reviewed.
- General Direction:** Exercises wide latitude in determining objectives and approaches to critical assignments.

B. Type of Responsibility/Area of Action performed by this position:	Yes	No	Provides Input
Screen / Interview Applicants	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hire / Promote Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide Written/Verbal Warnings	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suspend Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Terminate Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare Work Schedules For Others	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provide Work Direction For Others	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluate Performance Of Others	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Counsel Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Train Employees (As Part Of The Normal Duties Of The Job)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approve Overtime	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approve Time Off Request For Others	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Develop / Implement Policies	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Direct supervision⁴ of any employees. Number of FTEs and job titles of those employees listed below:

Job Title	# of FTEs
Accounting Specialist, Administrative Support Specialist, Administrative Support Assistant	2.0 -6.0 (Varies based on staffing in the customer service center)

SECTION 8 - PHYSICAL DEMANDS⁵ AND REQUIREMENTS /WORK ENVIRONMENT/TOOLS

N=Never (0 minutes per day) **S=Seldom** (1 to 5% of time, 1-25 Minutes a Day) **O=Occasional** (5 to 33% of time, 26 minutes to 2.5 hours per day)
F=Frequent (34 to 66% of time, 2.6 – 5.25 hours per day) **C=Constant** (67 to 100% of time, 5.26 and above hours per day)

Possess the physical capacity to perform the duties of the position including, but not limited to –	Never	Seldom	Occasional	Frequent	Constant
Carry/Lift/Lower/Push/Pull Objects or Materials of 10 - 50 Pounds	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Carry/Lift/Push/Pull Objects or Materials of > 50 Pounds; Handle Odd Objects	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alternate Sit/Stand or Walk at Will - The ability to alternate between sitting and standing is present when a worker has the flexibility to choose between sitting or standing as needed when this need cannot be accommodated by scheduled breaks and/or lunch period.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Climbing Ramps/Stairs - Ascending or descending ramps and/or stairs using feet and legs. Hands and arms may be used for balance (e.g., to hold a railing).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Climbing Ladders/Ropes/Scaffolding - Ascending or descending ladders, scaffolding, ropes, poles and the like using feet/legs and/or hands/arms.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

⁴ Section 111.70 (1)(o) Wis. Stats. defines a **supervisor** as: "...any individual who has authority, in the interest of the municipal employer, to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward or discipline other employees, or to adjust their grievances or effectively to recommend such action, in connection with the foregoing the exercise of such authority is not of a merely routine or clerical nature, but requires the use of independent judgment."

⁵ <https://www.bls.gov/ncs/ors/physical.htm>

Communicating Verbally - Expressing or exchanging ideas by means of the spoken word to impart oral information to clients or the public and to convey detailed spoken instructions to other workers accurately, loudly, or quickly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Crawling - Moving about on hands and knees or hands and feet.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crouching - Bending body downward and forward by bending legs and spine.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Far Visual Acuity - Clarity of vision at 20 feet or more. This is not just the ability to see a person or object, but the ability to recognize features as well.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Fine Manipulation - Picking, pinching, or otherwise working primarily with fingers rather than the whole hand or arm as in gross manipulation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Foot/Leg Controls - Use of one or both feet or legs to move controls on machinery or equipment. Controls include, but are not limited to, pedals, buttons, levers, and cranks.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gross Manipulation - seizing, holding, grasping, turning, or otherwise working with hand(s). Note: Fingers are involved only to the extent that they are an extension of the hand.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hearing Requirements - The ability to hear, understand, and distinguish speech and/or other sounds (e.g., machinery alarms, medical codes/alarms). A yes or no answer is captured for each of the five hearing requirements listed:					
One-on-one (in person)	Yes				
Group or conference (in person)	Yes				
Telephone	Yes				
Other sounds	Yes				
Passing of hearing test required	No				
Keyboarding - Entering text or data into a computer or other machine by means of a keyboard. Devices include traditional keyboard, tablet, 10 key pad, touch screen, smart phone, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Kneeling - Bending legs at knees to come to rest on knee(s)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting/Carrying - Lifting is to raise or lower an object from one level to another (includes upward pulling). Carrying is to transport an object – usually by holding it in the hands or arms, but may occur on the shoulder.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Near Visual Acuity - Clarity of vision at approximately 20 inches or less (i.e., working with small objects or reading small print), including use of computers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Peripheral Vision - Observing an area that can be seen up and down or to right or left while eyes are fixed on a given point.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pushing/Pulling - Pushing/pulling may involve use of hands/arms, feet/legs, and/or feet only done with one side of the body or both sides. Pushing - Exerting force upon an object so that the object moves away from the force; Pulling - Exerting force upon an object so that the object moves toward the force	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reaching At/Below Shoulder Level - Extending hand and arms from 0 up to 150 degrees in a vertical arc. Reaching requires the straightening and extension of the arm and elbow and the engagement of the shoulder. The elbow does not need to be locked at any time and the arm does not need to remain in a continuously straight position.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reaching Overhead - Extending hands and arms in a 150 to 180 degrees vertical arc. Reaching requires the straightening and extension of the arm and elbow and the engagement of the shoulder. The elbow does not need to be locked at any time and the arm does not need to remain in a continuously straight position.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sitting - Remaining in a seated position.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Standing/Walking - Standing is to remain on one's feet in an upright position at a workstation without moving about. Walking is to move about on foot.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Stooping - Bending the body downward and forward by bending the spine at the waist - requiring full use of the lower extremities and back muscles.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Possess the capacity to effectively and efficiently work with/in the following conditions -	Never	Seldom	Occasional	Frequent	Constant
Indoor/Office Work Environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Outdoor Work Environment Extreme Hot/Cold Temperatures (>90 degrees / <40 degrees)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Insects	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rodents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exposure to Various Lighting Conditions (High, Low, LED, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Noise >85dB (e.g. mower, heavy traffic, milling machine, etc.)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Outdoor Weather Conditions (Dry/Wet/Slippery)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hazardous Fumes or Odors / Toxic Chemicals	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Confined Spaces (as identified by OSHA)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Close Proximity to Moving Machinery / Equipment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Bodily Fluids / Communicable Diseases	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Working Alongside Moving Traffic on Roads	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electrical Hazards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vibrations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dust	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interact with persons of various social, cultural, economic, personal hygiene standards, mental capacities, and educational backgrounds.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tools Used (add as needed)	Level of Proficiency⁶ if applicable	Never	Seldom	Occasional	Frequent	Constant
Office Equipment: Desktop Computer, Copier, Phone, Fax, Scanner, etc.	<input type="checkbox"/> Basic <input checked="" type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Field Technology: Ipad/Laptop/Smartphone	<input checked="" type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Microsoft Outlook	<input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input checked="" type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Microsoft Word	<input type="checkbox"/> Basic <input checked="" type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Microsoft Excel	<input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input checked="" type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Microsoft Access	<input checked="" type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Microsoft PowerPoint	<input checked="" type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adobe Acrobat Professional	<input checked="" type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legistar/Granicus	<input checked="" type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BP Logix/MGO	<input type="checkbox"/> Basic <input checked="" type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Novatime	<input type="checkbox"/> Basic <input checked="" type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HTE/Sungard	<input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input checked="" type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Assetworks	<input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Municode	<input checked="" type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GIS	<input checked="" type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GPS software and reporting	<input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Civic Ready	<input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Docuware (Document Management System)	<input checked="" type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Neogov (Insight, Perform)	<input checked="" type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CivicPlus (Internet, Intranet CMS)	<input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internet	<input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced <input type="checkbox"/> Expert	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal Vehicle	Maintain Wisconsin Driver's License.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No – As needed				
City Vehicle	Maintain Wisconsin Driver's License.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No – As needed				

Section 9 - Additional Comments

Any additional information:
 This position requires a very high level of accuracy and detail. Multi-tasking is an essential skill needed to perform this job. Ability to learn quickly and independently to adapt to the ever-changing needs of the department. Ability to deal with agitated and unruly citizens in a professional and calming manner. Analytical skills are also needed to analyze financial reports. An understanding of bonds and financial markets for investment strategy. Thorough knowledge of GAAP is required. Ability to stay current with new regulations and requirements imposed by state and federal governments, and GAAP updates.

The City of West Allis is an Equal Opportunity/Affirmative Action Employer and does not discriminate against individuals on the basis of race, color, religion, age, marital or veterans' status, sex, national origin, disability, or any other legally protected status in the admission or access to, or treatment or employment in, its services, programs or activities. Upon

⁶ Basic – Fundamental knowledge of common usage; Intermediate – able to perform independently with occasional guidance a majority of tasks related to position, utilizes tools in the most efficient and effective manner on a regular basis; Advanced – able to perform independently all tasks related to position, constantly utilizes tools in the most efficient and effective manner, able to implement and make suggestions on how the tools could improve processes and productivity; Expert – Recognized Authority, Go to person, able to teach others

reasonable notice the City will furnish appropriate auxiliary aids and services when necessary to afford individuals with disabilities an equal opportunity to participate in and to enjoy the benefits of a service, program or activity provided by the City. It is the policy of the City of West Allis to provide language access services to populations of persons with Limited English Proficiency (LEP) who are eligible to be served or likely to be directly affected by our programs. Such services will be focused on providing meaningful access to our programs, services and/or benefits.

This JDQ has been prepared to assist in defining job responsibilities, physical demands, and skills needed. It is not intended as a complete list of job duties, responsibilities, and/or essential functions. This description is not intended to limit or modify the right of any supervisor to assign, direct, and control the work of employees under supervision. I understand that the City retains and reserves any or all rights to change, modify, amend, add to or delete from, any section of this document as it deems, in its judgment, to be proper.

EMPLOYEE: _____ DATE: _____ SUPERVISOR: _____ DATE: _____
DEPT. HEAD: _____ DATE: _____ HR REP: _____ DATE: _____