



**MILWAUKEE COUNTY
JOB EVALUATION QUESTIONNAIRE**

This form is designed to assist you in describing your departmental job. You are asked to fill this form out to outline the essential duties and responsibilities; and identify the knowledge, skills and abilities required to successfully perform the job. This form is used to request new job classifications, review current classifications, reclassification, reallocations, and general updates to the job description. **Note:** It is the job that is being evaluated, not the position/incumbent. Thank you for your cooperation.

GENERAL INSTRUCTIONS:

1. Before beginning, please look over the entire questionnaire. Each question should be answered completely and accurately. If a question does not apply to this job, please indicate "N/A" (Not Applicable).
2. To complete the questionnaire, please type and/or select your responses.
3. If you wish to make additional comments, please use the space available in the "Additional Comments" section on page 6 of this questionnaire.

A. JOB IDENTIFICATION INFORMATION

Department (High Org):	9000	Division (Low Org):	9010
Contact for this Study	Name: Jeremy Lucas	Email: Jeremy.Lucas@milwaukeecountywi.gov	
	Title: Director of Administration & Planning	Phone: 414-257-4775	
Current Job Title:	Financial Manager – Parks	Current Job Code:	00079710
Health Screen Level:		Background Check Level:	
Job Reports To:	Title: Director of Administration & Planning		
Request Type:	<input checked="" type="checkbox"/> Establish New <input type="checkbox"/> Review <input type="checkbox"/> Reclassification <input type="checkbox"/> Reallocation <input type="checkbox"/> Update Description <input type="checkbox"/> Other, Specify		

B. JUSTIFICATION STATEMENT

1. Attach an organizational chart.
2. Explain the events or changes that made this request necessary.
Vacancy of position and review for recruitment

C. ABOUT THE JOB

Job Status:	<input checked="" type="checkbox"/> Regular Full-Time	<input type="checkbox"/> Regular Part-Time	<input type="checkbox"/> Seasonal	<input type="checkbox"/> Contract
Shift:	<input checked="" type="checkbox"/> Day	<input type="checkbox"/> Evening	<input type="checkbox"/> Night	<input type="checkbox"/> Other:
Hours Per Week:	<input type="checkbox"/> >40 Hours	<input type="checkbox"/> 32-40 Hours	<input type="checkbox"/> 20-32 Hours	<input type="checkbox"/> <20 Hours
Travel:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If Yes, % Travel			
Will This Job Supervise/Manage?	<input type="checkbox"/> Supervise	<input checked="" type="checkbox"/> Manage # of Direct Reports: 5	<input type="checkbox"/> N/A	
Fiscal Responsibility: Responsible for annual operating budget for department(s)/division(s)?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide total amount?			

D. JOB SUMMARY:

Briefly state, in several sentences, the principle purpose or function of the job. Respond by describing What the job is, What its major objective is, and Why does it exist. Directs, coordinates, implements, and manages staff and workload for financial transactions, budget creation, budget management and purchasing functions of the Parks Department. Assists with development of departmental fiscal policy and procedures to ensure long-term sustainability. Responsible for compliance with Generally Accepted Accounting Principles (GAAP), governmental accounting practices and statutes/ordinances relating to Milwaukee County.
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E. ESSENTIAL DUTIES/RESPONSIBILITIES:

JOB RESPONSIBILITY LIST: Please describe the major elements of the job. List only the major functions, separately, in order of importance. Provide a one or two line descriptive statement for each duty so that someone not familiar with this kind of work can understand it. Weight the approximate percentage of allocated work time for each functional work activity (Round to the nearest **10%**). We do not need to know HOW the function is to be performed, but rather, WHAT it is to be performed. **Percentages should add up to 100%**

1.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Personnel Management	% of Time: 25
	<i>Descriptive:</i> Provide daily coaching and mentoring of finance staff to align job assignments and workload toward short and long-term priorities. Coordinate personnel and division succession planning through hiring, workforce development and performance appraisals.		
2.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Monitor and Control Finances	% of Time: 25
	<i>Descriptive:</i> Prepare, analyze, and reconcile financial data. Investigate accounts for variances, forecast revenues and expenditures and advise department leadership on potential opportunities and challenges. Ensure compliance with generally accepted accounting standards, county policy and statutory requirements.		
3.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Fiscal and Budget Reporting	% of Time: 20
	<i>Descriptive:</i> Prepare, submit, and present fiscal and budget reports on behalf of the Parks Department to the Office of the Comptroller, County Executive and County Board. Communicate financial data to internal stakeholders within the Parks Department.		
4.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Prepare budgets	% of Time: 15
	<i>Descriptive:</i> Coordinate and manage preparation of annual departmental operating and capital budgets that align with statutory requirements, County and departmental vision and support the long-term sustainability of the organization.		
5.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Perform Audits	% of Time: 5
	<i>Descriptive:</i> Conduct random site audits for cash handling procedure verification, fraud management, provide feedback and recommendations for policy revisions as necessary.		
6.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Department Fiscal Coordination	% of Time: 5
	<i>Descriptive:</i> Work with departmental management staff to resolve fiscal related issues and maximize department performance. Review contracts and agreements for services, requests for proposals from potential service vendors and terms of service contracts. Assist with strategic planning and departmental revenue initiatives.		
7.	<input checked="" type="checkbox"/> Original <input type="checkbox"/> New	Job Duty: Special Projects	% of Time: 5
	<i>Descriptive:</i> Lead and participate in continuous improvement projects, departmental initiatives, or other related special projects.		
8.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		
9.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		
10.	<input type="checkbox"/> Original <input type="checkbox"/> New	Job Duty:	% of Time:
	<i>Descriptive:</i>		

F. EQUIPMENT, TOOLS & MATERIALS, PERSONAL COMPUTERS, SOFTWARE

Please list all equipment, tools or materials required to perform the job along with the frequency.		Frequency			Type of Equipment
		Daily	Weekly	Monthly	
1. Machinery: (i.e. Vehicles, Motorized Equipment, Heavy Machinery, etc)				X	Vehicle
2. Hand Tools/Instruments: (i.e. Power Tools, Equipment, Weapons, etc.)		X			Computer, scanner/copier, general office equipment
3. Driving required?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	List License Types: (Required)	DL Class D,		
		List License Types: (Preferred)			
4. Personal vehicle required?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
5. Please list all <u>Technology, Systems and Software Knowledge</u> required to perform the job:					
Basic	Intermediate	Advanced			
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Knowledge of all related computer and software applications, such as word processing and spreadsheets.		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:		

G. JOB COMPETENCIES

Internal/External Contacts: Please select all that apply.	
<input checked="" type="checkbox"/>	Exchange of basic information with internal and/or external contacts.
<input checked="" type="checkbox"/>	Maintain sensitive or confidential information.
<input checked="" type="checkbox"/>	Explain and gather information, answer queries, or provide assistance to internal and/or external contacts.
<input checked="" type="checkbox"/>	Persuade, conform or recommend course of action with internal and/or external contacts.
<input checked="" type="checkbox"/>	Perform with a high degree of authority in securing understanding and cooperation with internal and/or external contacts.
<input type="checkbox"/>	Maintain a continuing working relationship that can have a significant effect on the success of the organization.

Communication Skills: Select the level of language (ability to read, write and speak needed to successfully accomplish the essential duties of the job.) Please select all that apply.	
<input checked="" type="checkbox"/>	Read, write and comprehend simple instructions, reports, short correspondence and memos.
<input checked="" type="checkbox"/>	Speak effectively before both internal and/or external groups.
<input checked="" type="checkbox"/>	Read, analyze, and interpret safety rules, operating/maintenance instructions and procedure manuals, scientific/technical journals and procedures, government regulations, financial and legal documents.
<input type="checkbox"/>	Prepare and/or present written communications that pertain to controversial and complex topics.

Decision-Making: Please select <u>only one</u> of the following:	
<input type="checkbox"/>	Makes minimal decision-making responsibility.
<input type="checkbox"/>	Makes decisions of responsibility involving evaluation of information; decisions may require development or application of alternatives or precedents.
<input checked="" type="checkbox"/>	Makes decisions of responsibility and final results that affect more than one department or a department with multiple units; substantial analysis is required, and many factors must be weighed before a decision can be reached.
<input type="checkbox"/>	Makes decisions of responsibility and final recommendations, which may result in the formulation of strategic plans of action to achieve the broad objectives for the organization; involves long-range future planning including scope, direction and goals.

Complexity, Judgment and Problem Solving: Please select all that apply.	
<input checked="" type="checkbox"/>	Understand and follow instructions.
<input checked="" type="checkbox"/>	Execute decisions within limits of standard policy and procedures.
<input checked="" type="checkbox"/>	Interpret and adapt to established practices and procedures using independent judgment to meet situations to which applications are not clearly defined.
<input checked="" type="checkbox"/>	Perform within difficult or complex working conditions or situations not easily evaluated; decisions require considerable judgment, initiative and ingenuity in areas there is little precedent.
<input checked="" type="checkbox"/>	Act independently in the formulation and administration of policies and programs for major departments or functions.

H. WORKING CONDITIONS

What are the physical, mental and environment demands for this job? Functions identified must coincide with the descriptive statement of essential duties and responsibilities for this job. The functions should focus on what is to be done and the processes traditionally used to achieve end results. For each of the following functional requirements, indicate the frequency in which it occurs in this job.

PHYSICAL DEMANDS	N/A	Seldom (<25%)	Occasional (25% - 50%)	Frequent (50% - 75%)	Always (>75%)		
Standing	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Walking/Running	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Sitting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Reaching	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Climbing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Driving	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Bending/Kneeling	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Hearing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Talking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Visual	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Typing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
Writing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Fine Dexterity	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Manual Dexterity	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Upper Extremity Repetitive Motion	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Lifting/Carrying (lbs.)	<input type="checkbox"/> up to 05	<input type="checkbox"/> up to 10	<input type="checkbox"/> up to 15	<input checked="" type="checkbox"/> up to 20	<input type="checkbox"/> up to 25	<input type="checkbox"/> up to 30	<input type="checkbox"/> up to <input type="text"/>
Pushing/Pulling (lbs.)	<input type="checkbox"/> up to 05	<input type="checkbox"/> up to 10	<input type="checkbox"/> up to 15	<input checked="" type="checkbox"/> up to 20	<input type="checkbox"/> up to 25	<input type="checkbox"/> up to 30	<input type="checkbox"/> up to <input type="text"/>

NON-PHYSICAL DEMANDS	N/A	Seldom (<25%)	Occasional (25% - 50%)	Frequent (50% - 75%)	Always (>75%)
Analysis/Reasoning	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Communication/Interpretation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Math/Mental Computation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Reading	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sustained Mental Activity (i.e. auditing, problem solving, grant writing, composing reports)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ENVIRONMENTAL DEMANDS	N/A	Seldom (<25%)	Occasional (25% - 50%)	Frequent (50% - 75%)	Always (>75%)
Work Independently	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Task Changes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tedious/Exacting Work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
High Volume Public Contact	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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"/>
Temperature Extremes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loud Noises	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Danger	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Toxic Substances (i.e. solvents, pesticides, etc.)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

WORK SCHEDULE: Please select all that apply.

<input checked="" type="checkbox"/>	Routine shifts hours. Infrequent overtime, weekend, or shift rotation.
<input type="checkbox"/>	Considerable irregularity of hours due to frequent overtime, weekend or shift rotation.
<input type="checkbox"/>	Regular and/or frequent on-call availability; nature of work frequently requires irregular, unpredictable or particularly long hours.

DEMANDS/DEADLINES: Please select all that apply.

<input type="checkbox"/>	Little or no stress created by work, employees or public.
<input checked="" type="checkbox"/>	Intermittent or cyclical work pressures with occasional exposure to high stress work environments.
<input checked="" type="checkbox"/>	High volume and variable work demands and deadlines that impose strain on a routine basis; frequent direct contact with individuals or exposure to highly stressful situation, demands or pressures.

I. EDUCATION, LICENSE, AND EXPERIENCE

EDUCATION
Please indicate the MINIMUM educational level required:

<input type="checkbox"/>	HS Diploma/GED	
<input type="checkbox"/>	Associate's Degree	Area of specialization/major:
<input checked="" type="checkbox"/>	Bachelor's Degree	Area of specialization/major: Finance, Accounting, Public Administration
<input type="checkbox"/>	Graduate Degree	Area of specialization/major:
<input type="checkbox"/>	Post Graduate Degree (PhD)	Area of specialization/major:
<input type="checkbox"/>	Professional Degree (Law, Medicine, etc.)	Area of specialization/major:
<input type="checkbox"/>	Other:	Please indicate:

LICENSE/CERTIFICATION: (Please complete Section F on Page 3 for Driving Requirements/License(s))
What license(s), certification/certificate(s), registration(s), or other regulatory requirements/training:

CPA preferred

WORK EXPERIENCE
Please indicate the MINIMUM number of years of practical experience required.

<input type="checkbox"/>	No experience	
<input type="checkbox"/>	Less than one year	Area(s) of experience:
<input type="checkbox"/>	One to two years	Area(s) of experience:
<input type="checkbox"/>	Two to five years	Area(s) of experience:
<input checked="" type="checkbox"/>	Five or more years	Area(s) of experience: Accounting, Finance, Budgeting

SUPERVISORY/MANAGEMENT EXPERIENCE

Please indicate the MINIMUM number of years of supervisory/management experience required.

<input type="checkbox"/> No experience	
<input type="checkbox"/> Less than one year	<i>Area(s) of experience:</i>
<input checked="" type="checkbox"/> One to three years	<i>Area(s) of experience:</i> Coaching, mentoring, leadership, supervision, performance evaluations, hiring
<input type="checkbox"/> Three to five years	<i>Area(s) of experience:</i>
<input type="checkbox"/> Five or more years	<i>Area(s) of experience:</i>

Supervisory/Managerial: If applicable, select the appropriate level of responsibility.

<input type="checkbox"/>	Level 1 General instructing, scheduling, and reviewing the work of others performing the same or directly related work. Acts as "lead worker". Functional supervision only. Recommends personnel actions (hiring, termination, pay changes, etc.) but does not independently conduct.
<input type="checkbox"/>	Level 2 Scheduling, supervision, and evaluation of work of employees who perform similar work assignments. Conducts all aspects of personnel actions (hiring, termination, pay changes, etc.).
<input checked="" type="checkbox"/>	Level 3 Scheduling, supervision and evaluation of work as a "manager" of the first line supervisors; or perform supervision of workers who perform distinct and separate blocks of work. Oversees and conducts all aspects of personnel actions (hiring, termination, pay changes, etc.). Are there subordinate supervisors reporting to this job? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If yes, how many? 7
<input type="checkbox"/>	Level 4 Scheduling, supervision and evaluation of work as a superior of "managers". Administers through subordinate managers, departmental multi-function programs or operations. Oversees and conducts all aspects of personnel actions (hiring, termination, pay changes, etc.). Are there subordinate supervisors/managers reporting to this job? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, how many?
<input type="checkbox"/>	Level 5 Scheduling, supervision, and evaluation of work as a superior of those in level 4. Are there subordinate supervisors/managers reporting to this job? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, how many?

List the names of the Positions and/or Department(s)/Division(s) supervised/managed by this job:

Finance Division

- Parks Ops Analyst 2 (4)
- Sr Budget & Management Analyst (1)
- Seasonal/Interns (2)

J. ADDITIONAL COMMENTSPlease list additional items not covered in this questionnaire that would be helpful to the Compensation Department in understanding this job.

- Position coordinates closely with Contract Manager & Contract Management Assistant to regarding revenue from partner obligations
- Position will regularly interact on behalf of the Parks department with the Office of the Comptroller, Office of Performance, Strategy & Budget and Central Business Office.

Please provide additional information and/or language so that Employment & Staffing can include it in the job announcement (Providing that the Compensation Department has approved).**K. SIGNATURES****SUPERVISOR'S/MANAGER'S CONFIRMATION:**

I have completed and/or reviewed the contents of this job evaluation questionnaire and consent to its accuracy.

Supervisor/Manager Signature:

Date: 10/5/2022

Department/Division Head Signature:

Date:

Email the completed form to: hrcompensation@milwaukeecountywi.gov. Please ensure the subject line includes the Department High Org., and (if applicable) Low Org. number, Request Type (i.e. JEQ Request, JEQ Study,) (I.e. 1140/1140 JEQ Request)