

JOB DESCRIPTION

FOR DER USE ONLY

Vacancy No.

City Service Commission:	Finance Committee:
Fire & Police Commission:	Common Council:

Instructions: Complete all sections. Refer to the *Guidelines for Preparing Job Descriptions* for instructions on completing specific items.

1. Date Prepared/ Revised: 7/1/2021		2. Present Incumbent: Tawauna Swanigan and Brigitte Nash		Is incumbent underfilling position?	
3. Date Filled: 5/2/11 and 2/20/11		4. Previous Incumbent: N/A and Margaret Cortez		YES <input type="checkbox"/> NO <input checked="" type="checkbox"/> If YES, indicate Underfill Title in box 10.	
5. Department: Fire Department			Bureau: Support Division:		Unit: Section: Budget and Finance
6. Work Location: 711 W. Wells St.			Telephone: 286-5282 / 286-8945 Email: tswani@milwaukee.gov and bnash@milwaukee.gov		Work Schedule: Hours: 7:30 am-4:00 pm / Days: M - F
7. Represented by a Union? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		8. Bargaining Unit: District Council 48 If in District Council 48, which local? 428			9. FLSA Status (check one): <input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Non-Exempt
10.	Official Title: Program Assistant III			Pay Range	Job Code
				5IN	0490DC
	Underfill Title (if applicable):				
Requested Title (if applicable):					EEO Code 603
Recommended Title (DER Use Only):				Approved by:	
				Date:	

11. BASIC FUNCTION OF POSITION:

Primary duties are to perform all accounts payable and purchasing accounting activities, and assist the Business Finance Manager with analyzing data from a variety of sources to create budgetary and fiscal reports. Secondary duties are to assist in the management of grants, and research productivity and cost-savings opportunities.

12. DESCRIPTION OF JOB (Check if description applies to **Official Title** or **Underfill Title**):

A. ESSENTIAL FUNCTIONS/Duties and Responsibilities: (Refer to the "Guidelines for Preparing Job Descriptions" for instructions on determining Essential Functions.)

% of Time	ESSENTIAL FUNCTION
25	• Reviews all accounts payable requests on the City's Financial Management Information System (FMIS) and processes them for payment, including review of all group registers.
15	• Prepares, monitors, and initiates the procurement process for all departmental commodity and services purchases, which includes preparation of requisitions and assisting department managers with monitoring and maintaining all commodity and service contracts.
10	• Monitors all budgetary accounts as not to exceed the current year's budget appropriations. Assists the Business Finance Manager with the implementation of budgetary and fiscal policies, and prepares expenditure reports as requested. Assists with the development and management of the annual operating and capital budgets.
10	• Monitors, reviews and processes PROCARD and petty cash transactions. Maintains list and user limits of PROCARD users, and adds and deletes users as necessary for departmental operations.
5	• Assists the Business Finance Manager with the preparation of grant applications, coordination of implementation and administration of the grants, and all grant-related budgeting and financial requirements, including processing interdepartmental requisitions and invoices (IRIs) for grant and aid adjustments.
5	• Provides complex monitoring and reporting assistance on inventory control projects.
5	• Researches budget information, including analyzing historical performance, to assist Business Finance Manager with administration of budget policy and procedures.
5	• Conducts research to assist in determining appropriate investment of capital items, including apparatus and buildings. Assists Business Finance Manager in reporting expenditures of capital projects.
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B. PERIPHERAL DUTIES:

% of Time	PERIPHERAL DUTY
5	<ul style="list-style-type: none"> Performs some regular functions of the Business Finance Manager in the absence of the incumbent.
5	<ul style="list-style-type: none"> Performs some regular functions of the other Program Assistant IIIs in the absence of the incumbents.
5	<ul style="list-style-type: none"> Performs some regular functions of the Personnel Payroll Assistant III in the absence of the incumbent.
5	<ul style="list-style-type: none"> Performs other duties related to the financial management of the department as requested, or independently initiates same.
	<ul style="list-style-type: none">

C. NAME AND TITLE OF IMMEDIATE SUPERVISOR:

Amanda M. Lewis, Business Finance Manager

D. SUPERVISION RECEIVED: (Describe the extent to which work assignments and methods are outlined, reviewed, and approved by this position’s supervisor.)

Majority of duties independently performed using initiative, skills, and sound judgement. Final review and approval is given by the Business Finance Manager.

E. SUPERVISION EXERCISED:

Total number of employees for whom responsible, either directly or indirectly = **3***.

Direct Supervision: List the number and titles of personnel directly supervised. Specify the kind and extent of supervision exercised by indicating one or more of the following:

a. Assign duties	e. Sign or approve work	
b. Outline methods	f. Make hiring recommendations	
c. Direct work in progress	g. Prepare performance appraisals	
d. Check or inspect completed work	h. Take disciplinary action or effectively recommend such	
Number Supervised	Job Title	Extent of Supervision Exercised (Select those that apply from list above, a - h)
	*This position may function as a group leader for the Personnel Payroll Assistant III and the two Program Assistant IIIs for various Budget and Finance Section projects.	

F. MINIMUM QUALIFICATIONS REQUIRED: (Indicate the MINIMUM qualifications required to enter the job.)

- i. Education and Experience:
Four years of clerical experience performing duties related to the budget and finance area is required, with at least one year of experience at the Office Assistant III level or above. The knowledge and skills required are equivalent to a Bachelor’s Degree. Equivalent combinations of education and experience may be considered.
- ii. Knowledge, Skills and Abilities:
Must be able to use advanced features of software packages on a regular basis to produce complex documents, and to work with queries, spreadsheets, and the City’s HRMS/FMIS systems. Strong math and budget/finance/accounting knowledge is necessary. Strong organizational and analytic skills are mandatory. Strong written and oral communications skills are required, including the ability to effectively communicate with a diverse group of coworkers within the division, and throughout the department.
- iii. Certifications, Licenses, Registrations:
- iv. Other Requirements:

13. PHYSICAL AND ENVIRONMENTAL DEMANDS: TOOLS AND EQUIPMENT USED

The Americans with Disabilities Act (ADA) of 1990, as amended by the Americans with Disabilities Act Amendments Act (ADAAA) of 2008 requires job descriptions to provide detailed information regarding the physical demands required to perform the essential functions of a job; the conditions under which the job is performed; and the tools and equipment the

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employee will be required to use on the job. Reasonable accommodations may be made to enable qualified individuals to perform the essential duties and responsibilities of the job for each of the categories listed below.

G. PHYSICAL ACTIVITY OF THE POSITION: (List the physical activities that are representative of those that must be met to successfully perform the essential functions of the job).

CHECK ALL THAT APPLY:

<input type="checkbox"/>	Climbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles, and the like; using feet and legs and/or hands and arms. Body agility is emphasized. Check only if the amount and kind of climbing required exceeds that required for ordinary locomotion.
<input type="checkbox"/>	Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. Check only if the amount and kind of balancing exceeds that needed for ordinary locomotion and maintenance of body equilibrium.
<input type="checkbox"/>	Stooping: Bending body downward and forward by bending spine at the waist. Check only if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.
<input type="checkbox"/>	Kneeling: Bending legs at knee to come to a rest on knee or knees.
<input type="checkbox"/>	Crouching: Bending the body downward and forward by bending leg and spine.
<input type="checkbox"/>	Crawling: Moving about on hands and knees or hands and feet.
<input type="checkbox"/>	Reaching: Extending Hand(s) and arm(s) in any direction.
<input type="checkbox"/>	Standing: Particularly for sustained periods of time.
<input type="checkbox"/>	Walking: Moving about on foot to accomplish tasks, particularly for long distances.
<input type="checkbox"/>	Pushing: Using upper extremities to exert force in order to draw, press against something with steady force in order to thrust forward, downward or outward.
<input type="checkbox"/>	Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.
<input type="checkbox"/>	Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. Check only if it occurs to a considerable degree and requires substantial use of the upper extremities and back muscles.
<input checked="" type="checkbox"/>	Fingering: Picking, pinching, typing or otherwise working primarily with fingers rather than with the whole hand or arm, as in handling.
<input type="checkbox"/>	Grasping: Applying pressure to an object with fingers and palm.
<input type="checkbox"/>	Feeling: Perceiving attributes of objects such as size, shape, temperature or texture by touching with the skin, particularly that of the fingertips.
<input checked="" type="checkbox"/>	Talking: Expressing or exchanging ideas by means of the spoken word. Those activities which demand detailed or important instructions spoken to other workers accurately, loudly or quickly.
<input checked="" type="checkbox"/>	Hearing: Perceiving the nature of sounds with no less than a 40 db loss. Ability to receive oral communication and make fine discriminations in sound.
<input checked="" type="checkbox"/>	Repetitive Motions: Substantial movements (motions) of the wrist, hands, and/or fingers.
<input type="checkbox"/>	Driving: Minimum standards required by State Law (including license).

H. PHYSICAL REQUIREMENTS OF THE POSITION: (List the physical requirements that are essential functions of the job.)

CHECK ONE:

<input checked="" type="checkbox"/>	Sedentary Work: Exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
<input type="checkbox"/>	Light Work: Exerting up to 10 pounds of force occasionally and/or negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for sedentary work and the worker sits most of the time, the job is rated for Light Work.
<input type="checkbox"/>	Medium Work: Exerting up to 50 pounds of force occasionally and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
<input type="checkbox"/>	Heavy Work: Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
<input type="checkbox"/>	Very Heavy Work: Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

I. VISUAL ACUITY REQUIREMENTS: (List the visual acuity requirements that are essential functions of the job.)

CHECK ONE:

<input checked="" type="checkbox"/>	Operators (Electronic Equipment), Inspection, Close Assembly, Clerical, Administrative: This is a minimum standard for use with those whose job requires work done at close visual range (i.e. preparing and analyzing data and figures, accounting, transcription, computer terminal, extensive reading, visual inspection involving small parts, operation of machines, using measurement devices, assembly or fabrication of parts).
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<input type="checkbox"/>	Machine Operators, Mechanics, Skilled Tradespeople: This is a minimum standard for use with those whose work deals with machines where the seeing job is at or within arm's reach. This also includes mechanics and skilled tradespeople and those who do work of a non-repetitive nature such as carpenters, technicians, service people, plumbers, painters, mechanics, etc. (If the machine operator also inspects, check the "Operators" box.)
<input type="checkbox"/>	Mobile Equipment Operators: This is a minimum standard for use with those who operate cars, trucks, forklifts, cranes, and high lift equipment.
<input type="checkbox"/>	Other: This is a minimum standard based on the criteria of accuracy and neatness of work for janitors, sweepers, etc.

J. THE CONDITIONS THE WORKER WILL BE SUBJECT TO IN THIS POSITION:

List the environmental/working conditions to which the employee may be exposed while performing the essential functions of the job. Include scheduling considerations such as on-call for emergencies, rotating shift, etc. **Approximate Percentage of time performing field work: 0%**

CHECK ALL THAT APPLY:

<input checked="" type="checkbox"/>	None: The worker is not substantially exposed to adverse environmental conditions (such as typical office or administrative work).
<input type="checkbox"/>	The worker is subject to inside environmental conditions: Protection from weather conditions but not necessarily from temperature changes (i.e. warehouses, covered loading docks, garages, etc.)
<input type="checkbox"/>	The worker is subject to outside environmental conditions: No effective protection from weather.
<input type="checkbox"/>	The worker is subject to extreme cold: Temperatures below 32 degrees for period of more than one hour.
<input type="checkbox"/>	The worker is subject to extreme heat: Temperatures above 100 degrees for periods of more than one hour.
<input type="checkbox"/>	The worker is subject to noise: There is sufficient noise to cause the worker to shout in order to be heard above the surrounding noise level.
<input type="checkbox"/>	The worker is subject to vibration: Exposure to oscillating movements of the extremities or whole body.
<input type="checkbox"/>	The worker is subject to hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, electrical current, working on scaffolding and high places or exposure to chemicals.
<input type="checkbox"/>	The worker is subject to atmospheric conditions: One or more of the following conditions that affect the respiratory system or the skin: Fumes, odors, dust, mists, gases or poor ventilation.
<input type="checkbox"/>	The worker is subject to oil: There is air and/or skin exposure to oils and other cutting fluids.
<input type="checkbox"/>	The worker is required to wear a respirator.

K. MACHINE, TOOLS, EQUIPMENT, ELECTRONIC DEVICES, SOFTWARE, ETC. USED BY POSITION:

List equipment needed to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.)

CHECK ALL THAT APPLY:

<input type="checkbox"/>	Camera and photographic equipment	<input checked="" type="checkbox"/>	Office Equipment (desk, chair, telephone, etc.)						
<input type="checkbox"/>	Cleaning supplies	<input checked="" type="checkbox"/>	Office supplies (pens, staplers, pencils, etc.)						
<input type="checkbox"/>	Commercial vehicle	<input type="checkbox"/>	Packing materials (boxes, shrink wrap, etc.)						
<input type="checkbox"/>	Data processing equipment	<input checked="" type="checkbox"/>	PC equipment (monitor, keyboard, printer, etc.)						
<input type="checkbox"/>	Handcart	<input checked="" type="checkbox"/>	PC software						
<input type="checkbox"/>	Hand tools (please list):								
<input checked="" type="checkbox"/>	Office Machines (check all that apply):	<input checked="" type="checkbox"/>	Copier	<input checked="" type="checkbox"/>	Facsimile	<input checked="" type="checkbox"/>	Calculator	<input type="checkbox"/>	Cash register
<input type="checkbox"/>	Other (please list):								

L. SUPPLEMENTARY INFORMATION: (Indicate any other information which further explains the importance, difficulty, or uniqueness of the position, such as its scope of responsibility related to finances, equipment, people, information, etc. Also indicate success factors such a personal characteristics that contribute to an individual's ability to perform well in the job, and any other special considerations.)

The incumbent must be able to work effectively and diplomatically with others, both within and outside the department. Discretion is also necessary to preserve confidentiality of highly sensitive information.

This position's duties are required to be performed at the office of its assigned bureau/division, unless approved to work elsewhere by the Chief.

M. I believe that the statements made above in describing this job are complete and accurate.

Signature of Department Head or Designated Representative

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