

Fire Department

**Douglas A. Holton**  
Chief  
**Brian Glassel**  
Assistant Chief

October 8, 2008

To the Honorable  
The Board of Fire and Police Commissioners  
200 East Wells Street, Room 706  
Milwaukee, Wisconsin 53202

RE: *RECLASSIFICATION REQUEST*

Dear Commissioners:

I respectfully request that one position of Business Finance Manager, Pay Range 009, in our Bureau of Administration, Chief's Office, currently occupied by Emma J. Stamps, be reclassified to Business Finance Manager, Pay Range 011. This position was created in the 2004 Budget, and has evolved from the original classification for the position.

The incumbent documented the evolution of this position to include increased responsibilities, including managing 33.3% more professional and clerical accounting and payroll staff. The position's consequences of error are greater in that planning, budgeting, monitoring, and reporting of annual operating, capital, and grant budgets have increased significantly.

Compared to 2004, the fire department operating budget increased by approximately \$12 million, capital improvement projects by more than 50%, and the size of the department's grant portfolio increased approximately \$8.2 million. Myself, the Mayor and Common Council members are increasingly relying upon the contributions from Ms. Stamps to assist in aligning goals of the department with those of the City of Milwaukee.

I ask that this request be referred to the Department of Employee Relations for study. Copies of the job description and Job Analysis Questionnaire are attached. Please contact me directly with any questions as this position reports directly to me. I can be reached at 286-8947. Thank you for your consideration in this matter.

Respectfully,

  
DOUGLAS A. HOLTON  
Chief

DH/MEM/jb  
Attachment  
FPC: Reclass Request BFMGR Stamps 10-16-08

# JOB DESCRIPTION

## FOR DER USE ONLY

Vacancy No. _____	
City Service Commission: _____	Finance Committee: _____
Fire & Police Commission: _____	Common Council: _____

**Instructions:** Complete all sections except No. 11. Refer to the "Guidelines for Preparing Job Descriptions" for instructions on completing specific items.

<b>1. Date Prepared/ Revised:</b> 9/25/2008	<b>2. Present Incumbent:</b> Emma J. Stamps	<b>Is incumbent underfilling position?</b> YES <input type="checkbox"/> NO <input checked="" type="checkbox"/>		
<b>3. Date Filled:</b> 8/13/2007	<b>4. Previous Incumbent:</b> Sandra J. Rotar	If YES, indicate underfill title in box 10.		
<b>5. Department:</b> Fire Department		<b>Bureau:</b> Administration <b>Division:</b> Support	<b>Unit:</b> 2 <b>Section:</b>	
<b>6. Work Location:</b> 711 W. Wells St.		<b>Telephone:</b> 286-5281 <b>Email:</b> ejstamp@milwaukee.gov	<b>Work Schedule:</b> Hours: 7:30 am - 4:00 pm / Days: Monday - Friday	
<b>7. Represented by a Union?</b> NO	<b>8. Bargaining Unit:</b> Management, General City <b>If in District Council 48, chose a Local:</b> None		<b>9. FLSA Status:</b> EXEMPT	
<b>10. Official Title:</b> Business Finance Manager		<b>Pay Range</b> 009	<b>Job Code</b> 4990	<b>EEO Code</b> 102
<b>Underfill Title (if applicable):</b>				
<b>Requested Title (if applicable):</b> Business Finance Manager		011	4990	102
<b>Recommended Title (DER Use Only):</b>	Approved by: _____ Date: _____			

### 11. BASIC FUNCTION OF POSITION:

Primary duty is to administer budget, including analyzing budget, developing budget strategy, conducting research, and developing and implementing cost control functions, as well as administer all financial aspects of the department, including purchasing, accounts payable, accounts receivable/invoices, and inventory controls. Monitors departmental expenditures and revenues of all operational, capital, and grant budgets. Works in a team complimenting efforts of Management and Accounting Officer, Bureau Chiefs, and other fire department personnel.

### 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
20	Responsible for the management and oversight of all aspects of the fire department's financial operations, including O&M, Capital and various grant budgets.
15	Responsible for budget, fiscal policy, assisting with strategic planning and development, and communicating performances to the Chief for reporting accountability in management to the Mayor.
15	Responsible for developing and preparing grant applications, coordinating the implementation and administration of the grants, and all grant-related budgeting and financial requirements.
10	Develops budget and fiscal presentations for discussion among various legislative bodies and business communities.
10	Manages audits, productivity and other studies in order to identify productivity, performance, and cost savings opportunities through innovative management concepts and best practices.
10	Develops and administers budget policy and procedures through budget research, auditing and analyzing historical performance, and evaluating future opportunities. Works in concert with Management and Accounting Officer to plan and develop annual budget request.
10	Develops revenue and capital budget forecasts. Acts as liaison on all capital projects, including evaluating proposals, monitoring progress, and reporting expenditures. Conducts or participates in research to determine appropriate investment of capital items, including apparatus and buildings.

**B. PERIPHERAL DUTIES:**

% of Time	PERIPHERAL DUTY
5	Periodically conducts internal audit functions at request of the Chief when it becomes essential to assess and evaluate the performance, efficiency, and effectiveness of department initiatives.
5	Researches and analyzes budgets of fire departments of communities of similar size, organization, and structure to Milwaukee for the purpose of developing innovative management concepts and best practices.
	•
	•
	•
	•
	•
	•
	•

**C. NAME AND TITLE OF IMMEDIATE SUPERVISOR:**

Douglas A. Holton, Chief

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

Receives general supervision from the Chief. The incumbent is expected to exercise considerable judgment in developing the methods and processes by which work assignments are performed. Individual initiative is expected.

**E. SUPERVISION EXERCISED:**

Total number of employees for whom responsible, either directly or indirectly = 3-10\*.

**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:

Number Supervised	Job Title	Extent of Supervision Exercised (Select those that apply from list above, a - h)
1	Management and Accounting Officer	a - h
1	Accounting Assistant III	a - h
1	Personnel Payroll Assistant II	a - h
*	Supervises or coaches various staff members and command officers of each bureau or division who require assistance regarding accounting, grants, and miscellaneous financial business.	a - e

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

i. Education and Experience:

Bachelor's Degree in Business Administration, Accounting, Finance, or related field, and five years of progressively responsible professional experience in budget, financial management, or policy/productivity analysis is required. Governmental budgeting, policy/productivity analysis, and supervisory experience is highly desirable. Master's Degree in Business Management is preferred.

ii. Knowledge, Skills and Abilities:

Strong written and oral communications skills, analytical, and research skills are required. Must be able to prepare and defend the budget and manage financial activities of a major City department. Personal computer and other technical systems knowledge is necessary.

iii. Certifications, Licenses, Registrations:

Position must be certified at IS-00700 level by the United States Department of Homeland Security National Incident Management Systems pursuant to industry standards.

i. Other Requirements:

**13. PHYSICAL AND ENVIRONMENTAL DEMANDS: TOOLS AND EQUIPMENT USED**

The Americans with Disabilities Act of 1993 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 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"/>	<b>Climbing:</b> 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"/>	<b>Balancing:</b> 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"/>	<b>Stooping:</b> 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"/>	<b>Kneeling:</b> Bending legs at knee to come to a rest on knee or knees.
<input type="checkbox"/>	<b>Crouching:</b> Bending the body downward and forward by bending leg and spine.
<input type="checkbox"/>	<b>Crawling:</b> Moving about on hands and knees or hands and feet.
<input type="checkbox"/>	<b>Reaching:</b> Extending Hand(s) and arm(s) in any direction.
<input type="checkbox"/>	<b>Standing:</b> Particularly for sustained periods of time.
<input type="checkbox"/>	<b>Walking:</b> Moving about on foot to accomplish tasks, particularly for long distances.
<input type="checkbox"/>	<b>Pushing:</b> 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"/>	<b>Pulling:</b> Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.
<input type="checkbox"/>	<b>Lifting:</b> 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"/>	<b>Fingering:</b> Picking, pinching, typing or otherwise working primarily with fingers rather than with the whole hand or arm, as in handling.
<input checked="" type="checkbox"/>	<b>Grasping:</b> Applying pressure to an object with fingers and palm.

<input type="checkbox"/>	<b>Feeling:</b> 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"/>	<b>Talking:</b> 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"/>	<b>Hearing:</b> 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"/>	<b>Repetitive Motions:</b> Substantial movements (motions) of the wrist, hands, and/or fingers.
<input type="checkbox"/>	<b>Driving:</b> 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"/>	<b>Sedentary Work:</b> 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"/>	<b>Light Work:</b> 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"/>	<b>Medium Work:</b> 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"/>	<b>Heavy Work:</b> 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"/>	<b>Very Heavy Work:</b> 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"/>	<b>Operators (Electronic Equipment), Inspection, Close Assembly, Clerical, Administrative:</b> 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).
<input type="checkbox"/>	<b>Machine Operators, Mechanics, Skilled Tradespeople:</b> 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"/>	<b>Mobile Equipment Operators:</b> This is a minimum standard for use with those who operate cars, trucks, forklifts, cranes, and high lift equipment.
<input type="checkbox"/>	<b>Other:</b> 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"/>	<b>None:</b> The worker is not substantially exposed to adverse environmental conditions (such as typical office or administrative work).
<input type="checkbox"/>	<b>The worker is subject to inside environmental conditions:</b> Protection from weather conditions but not necessarily from temperature changes (i.e. warehouses, covered loading docks, garages, etc.)
<input type="checkbox"/>	<b>The worker is subject to outside environmental conditions:</b> No effective protection from weather.
<input type="checkbox"/>	<b>The worker is subject to extreme cold:</b> Temperatures below 32 degrees for period of more than one hour.
<input type="checkbox"/>	<b>The worker is subject to extreme heat:</b> Temperatures above 100 degrees for periods of more than one hour.
<input type="checkbox"/>	<b>The worker is subject to noise:</b> There is sufficient noise to cause the worker to shout in order to be heard above the surrounding noise level.
<input type="checkbox"/>	<b>The worker is subject to vibration:</b> Exposure to oscillating movements of the extremities or whole body.

<input type="checkbox"/>	<b>The worker is subject to hazards:</b> 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"/>	<b>The worker is subject to atmospheric conditions:</b> 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"/>	<b>The worker is subject to oil:</b> There is air and/or skin exposure to oils and other cutting fluids.
<input type="checkbox"/>	<b>The worker is required to wear a respirator.</b>

**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.)

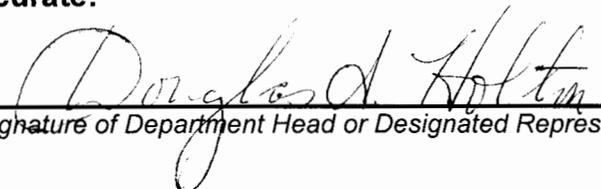
**CHECK ALL THAT APPLY:**

<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 <i>(please list):</i>	
<input type="checkbox"/> Office Machines <i>(check all that apply):</i> <input checked="" type="checkbox"/> Copier <input checked="" type="checkbox"/> Facsimile <input checked="" type="checkbox"/> Calculator <input type="checkbox"/> Cash register	
<input type="checkbox"/> Other <i>(please list):</i>	

**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 as personal characteristics that contribute to an individual's ability to perform well in the job, and any other special considerations.)

Must be able to direct and perform management improvement projects. Must be able to build and maintain a harmonious working relationship with departmental personnel, top level management, and policymakers. Must work with highly sensitive confidential information and preserve its security.

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

  
 \_\_\_\_\_  
 Signature of Department Head or Designated Representative



Department of Employee Relations  
Compensation Services Section  
City Hall, Room 706  
R. 05/16/07

**JOB ANALYSIS QUESTIONNAIRE  
For City of Milwaukee Classification Studies**

**Background and Purpose:**

The purpose of this Questionnaire is to gather comprehensive information about jobs directly from individuals performing the work so that the Department of Employee Relations can consider all relevant information and make a fair and informed decision as to whether a change in classification is appropriate.

Thank you for taking the time to complete this Questionnaire. While the Questionnaire is somewhat lengthy, some sections may not apply to your job. Please keep in mind that the process of evaluating a job is quite complex and requires the analysis of a number of job-related factors. The items in this Questionnaire are designed to elicit the information needed for this analysis. Therefore, it is to your advantage to complete the Questionnaire as thoroughly and accurately as possible.

It is also important to note that the classification study process focuses entirely on the duties and responsibilities of the job and not on the job performance, amount of training, special talents and abilities, or other characteristics of the incumbent.

**Employee Guidelines:**

- This Questionnaire has been formatted to be completed "on-screen." Move your cursor to the first field, type and then tab to the next field. Please name and save this document if you cannot complete it at once.
- Answer each question as completely and as accurately as possible, yet in a concise manner. If a question is not applicable, please write "does not apply."
- Take the time to read through the entire Questionnaire before proceeding.
- You are permitted to complete the Questionnaire during regular working hours as long as it does not interfere with the performance of your job duties or providing service to your internal and external customers.
- Do not try to complete the entire Questionnaire all at once. Make notes on each section and then go back over your responses during the time you have to complete the information.
- Keep the Questionnaire at or near your work station or desk. As you are performing your job, you will think of additional information. Later, go back and review it and, if necessary, revise what you have written.
- Attach additional pages, if necessary.
- Forward the completed Questionnaire to your immediate supervisor for review, comments and signature.

If you have any questions or do not understand any part of the Questionnaire or need any assistance, contact either your supervisor or Andrea Knickerbocker, Human Resources Manager at 286-3387 (or Faranda Wragg, 286-3143) in the Department of Employee Relations.

**When completed and reviewed by your supervisor, it should be sent to the Department of Employee Relations, City Hall, Room 706, and ATTN: Faranda Wragg.**

**1) EMPLOYEE INFORMATION**

Name:	Emma J Stamps	Date:	October 1, 2008
Official Job Title:	Business Finance Manager		
Working Title (if applicable):	Business Finance Manager		
Department:	Milwaukee Fire Department	Division:	Administration Bureau
Section:	n/a	Unit:	Finance
Work Location (building):	711 West Wells	Telephone:	414-286-5281
Email Address:	ejstamp@milwaukee.gov	Best time to contact:	7-5 am <input type="checkbox"/> pm <input checked="" type="checkbox"/>
Time employed in current classification: 1 Years / 2 Months			
Immediate Supervisor:			
Name: Douglas A Holton			
Title: Fire Chief			
Telephone number: 414-286-8947			

**2) OUTLINE OF ORGANIZATION CHART**

Using the outline below, please fill in the classifications of:

- a) your immediate supervisor
  - b) employees you work with and who also report to your supervisor
  - c) employees you supervise (*attached a printed chart with the same information if you prefer*)
- NOTE: In Line 3, list only those positions over which you have direct supervisory authority

(Line 1) Immediate Supervisor:	Fire Chief
(Line 2) Yourself : Coworkers:	Business Finance Manager
(Line 3) Positions over which you have direct supervisory authority:	Mgmt & Acctng Officer, Acctng Asst III, Personnel Payroll Asst II,

**3) PURPOSE OF WORK UNIT AND POSITION**

What is the nature of services and programs provided by your work unit?

To deliver resource management experience and support in all business and financial matters of the Milwaukee Fire Department in areas of budgeting, strategic planning, payroll adjusting, performance measurement, auditing, accounts payable, accounts receivable, and grant research and administration, and resource management.

Briefly describe what you consider the major purpose or objective of your position:

To assist the Fire Chief in the development, implementation and monitoring of strategic planning, operating, capital grant budgeting, cost controls, purchasing, accounts receivable, accounts payable and payroll functions..

**4) JOB CONTENT: TYPICAL DUTIES AND RESPONSIBILITIES**

- In completing this section you may use the Job Description as a guide, but please make sure you describe the job as it is actually performed.
- In the spaces below, please identify the 3-5 major responsibility areas that comprise your job. Then below each major responsibility area describe the specific duties and responsibilities that are associated with that area. Also indicate the approximate percentage of time spent in each major responsibility area.
- List the most important responsibility area first, the second most important, and so forth.

- Begin each duty/responsibility statement with an action verb, such as “plans,” “monitors,” “supervises,” “reviews,” and the like.
- Do not list any duty or responsibility that requires less than 5% of the time.

<b>25%</b>	<b>Major Responsibility Area: Responsible for the management and oversight of all aspects of the Fire Department’s financial operations, including O&amp;M, Capital and various grant budgets.</b>
------------	--

Specific duties within this responsibility area:

- a) Manages audits, productivity and other studies in order to identify productivity, performance and cost savings opportunities through innovative management concepts and best practices.
- b) Researches and analyzes budgets and programs of fire departments of communities of similar size, organization and structure to Milwaukee for the purpose of developing innovative management concepts and best practices.
- c) Develops budget and fiscal presentations for discussion among various legislative bodies and business communities.
- d) Reports on the department financial condition and performances to the Mayor, Fire Chief, Fire & Police Commission Executive Director and Common Council committees as required by Charter and Ordinance.
- e) Functions as the liaison on all capital projects, including evaluating proposals, monitoring progress, and reporting expenditures.
- f) Hire, evaluate, manage, train and direct 3+ personnel in personnel, inventory and cost controls.
- g) You will be overseeing year-end closings and the annual auditing process, maintaining fixed asset records and depreciation schedules. You will also be responsible for overseeing daily accounting functions including accounts payable and payroll processing, staff pay increases, check requests, reconciliation, and the supervision of three staff members.

<b>15%</b>	<b>Major Responsibility Area: Responsible for providing financial advice and support to clients and colleagues to enable them to make sound business decisions</b>
------------	--

Specific duties within this responsibility area:

- a) Assesses the financial implications of new or existing ventures.
- b) Conducts reviews and evaluations for cost-reduction opportunities
- c) Oversees budgetary control
- d) Leads, or collaborates with Bureau Chiefs and managers on, projects
- e) Supervises staff in accordance with company policies and procedure
- f) Manages audits, productivity and other studies in order to identify productivity, performance and cost savings opportunities through innovative management concepts and best practices.

<b>30%</b>	<b>Major Responsibility Area: Responsible for developing and preparing grant applications, coordinating the implementation and administration of the grants and all grant-related budgeting and financial requirements.</b>
------------	---

Specific duties within this responsibility area:

- a) Performs financial manager duties and responsibilities of each federal, state and local grant program awarded to the Milwaukee Fire Department
- b) Prepares, reports and monitors grant financial performances.
- c) Initiates or prepares legislative text for Common Council adoption of grant application, acceptance and expenditures.
- d) Coordinates the organization of bureau responses on announced and unannounced grant audits.
- e) Responsible for the business and finance staff effectively charging grant eligible payable and receivables.
- f)

<b>30%</b>	<b>Major Responsibility Area: Responsible for providing financial advice and support to clients and colleagues to enable them to make sound business decisions</b>
------------	--

Specific duties within this responsibility area:

- a) Provides and interprets financial information
- b) Develops business models and forecasts
- c) Monitors performance and efficiency
- d) Analyzes change and conducts risk assessment
- e) Participates in strategic planning, and formulating long-term business plans
- f) Researchs and reports to the Fire Chief, Mayor and other elected officials on factors influencing business performance.

<b>%</b>	<b>Major Responsibility Area:</b>
----------	-----------------------------------

Specific duties within this responsibility area:

- a)
- b)
- c)
- d)
- e)
- f)

### 5) CHANGES IN THE POSITION'S RESPONSIBILITIES

Describe the principal changes which have occurred in the duties and responsibilities of your job since it was last classified or since you were hired into the position. Refer to responsibilities areas outlined above. Important: Describe how each change has impacted the position in terms of skills required, physical or mental effort, responsibility level, and working conditions.

Duty/Respon. No. <b>1-4</b>	<b>Increased level of managing the operational and fiscal activities of the department to include: larger staffing levels, larger O&amp;M, Capital &amp; Grant budgets, and align department financial and City goals</b>
Duty/Respon. No. <b>2</b>	<b>Staffing increased by 33% since last studied by DER in 2004; Implementation of the Management Pay Plan required more frequent evaluation of subordinate performance and recommendation for compensation levels.</b>
Duty/Respon. No. <b>3</b>	<b>Grant management activities and portfolio have increase in number of grants, value of grants and frequency of reporting for overall grant portfolio.</b>
Duty/Respon. No.	

### 6) LEAD WORKER RESPONSIBILITIES

Lead workers function in a "lead" capacity for a group of employees working on a project or on a regular assigned basis and typically spend a substantial portion of their time performing the same or similar duties as those they are leading.

Lead worker duties may include those listed below in Item C.

- a) Do you ever act as a lead worker for other employees? Yes  No
- b) What proportion of your time do you spend on lead worker responsibilities? **5%**
- c) Type of direction provided. Check each of the phrases below which describe the kind of direction this position is required to exercise independently:

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> Train employees                   | <input checked="" type="checkbox"/> Set work priorities   |
| <input checked="" type="checkbox"/> Assign/lay out work for employees | <input type="checkbox"/> Balance the work among employees   |
| <input checked="" type="checkbox"/> Answer questions                  | <input type="checkbox"/> Schedule work  |
| <input checked="" type="checkbox"/> Monitor work in progress          | <input checked="" type="checkbox"/> Make reports to managers/supervisors                                |
| <input checked="" type="checkbox"/> Provide direction                 | <input checked="" type="checkbox"/> Provide general input on employee performance to manager/supervisor |
| <input checked="" type="checkbox"/> Review work products/results      |   |

**7) SUPERVISION EXERCISED**

- a) Do you formally supervise other employees Yes  No
- b) What is the **total number** of employees for whom you are responsible, directly and indirectly? **3 +**
- c) List below the job titles of the people who report **directly** to you and the number of employees within each title:

TITLE	No. of Employees
Management & Accounting Officer	1
Accounting Assistant III	1
Personnal Payroll Assistant II	1

- d) What proportion of your time do you spend in supervisory duties and/or planning or reviewing the work of others? **30%**
- e) Type of Supervision

Check each of the phrases below which describe the kind of supervision this position is required to exercise independently:

General Supervision	Employment Decisions	Performance Management
<input checked="" type="checkbox"/> Plan work, establish priorities	<input checked="" type="checkbox"/> Make hiring recommendations	<input checked="" type="checkbox"/> Prepare probationary report
<input checked="" type="checkbox"/> Assign work, add or delete duties	<input checked="" type="checkbox"/> Make final decision on hiring	<input checked="" type="checkbox"/> Prepare performance evaluation
<input checked="" type="checkbox"/> Instruct and train in methods and procedures	<input checked="" type="checkbox"/> Make promotional recommendations	<input checked="" type="checkbox"/> Make recommendations regarding unsatisfactory performance
<input type="checkbox"/> Check/inspect completed work	<input checked="" type="checkbox"/> Make final decisions on promotions	<input checked="" type="checkbox"/> Prepare performance/job improvement plan
<input checked="" type="checkbox"/> Respond to complaints	<input checked="" type="checkbox"/> Recommend transfer /reassignment	<input checked="" type="checkbox"/> Recommend disciplinary action
<input checked="" type="checkbox"/> Respond to grievances (Step 1)	<input type="checkbox"/> Other:	<input checked="" type="checkbox"/> Recommend termination
<input type="checkbox"/> Other:		<input type="checkbox"/> Other:

**8) SUPERVISION RECEIVED**

- a) To what extent are your work assignments and methods outlined, reviewed, and approved by your Supervisor?

Receives general supervision from the Fire Chief. The incumbent is expected to exercise considerable judgment in developing the methods and processes by which work assignments are performed. Individual initiative is expected.

- b) Do you establish your own work priorities or are they established for you? If established by others, please identify them by job title.

Receives general supervision from the Fire Chief. The incumbent is expected to exercise considerable judgment in developing the methods and processes by which work assignments are performed. Individual initiative is expected.

- c) List positions, other than your immediate supervisor, that provide you with advice, counsel, or functional guidance, and briefly discuss the nature and purpose of that guidance.

Collaborates with Bureau Deputy Chiefs, Comptrollers, Mayors, Department of Employee Relations, City Attorney, Labor Relations and other department representatives to develop, implement and/or execute policies, procedures and actions when appropriate.

## 9) DECISION AUTHORITY/RECOMMENDATION AREAS

List responsibilities or activities for which you have **full decision-making authority** to implement (approval of others not required):

- a) Schedule and conduct department meetings.
- b) Provides analysis and reviews resource allocation to ensure optimal returns are realized from space, inventory, advertising, labor and other resources.
- c) Assist staff to resolve complex or out of policy operation problems

List responsibilities or activities for which you **make recommendations to a supervisor** for final decision:

- a) Responsible for identifying underperforming areas and initiating projects to improve performance.
- b) This position is responsible for overseeing development and public dissemination of the annual operating and capital budgets along with information regarding the City's revenue and expenditures; performs fiscal and policy studies, analysis of program and budget alternatives, management productivity and performance measurement studies, and budget administration; plans and coordinates compilation of annual operating and six year capital budgets for all funds; reviews, researches, and prepares recommendation on budgetary and revenue changes; prepares the recommended and approved budget documents for public distribution; and performs special projects as assigned.
- c)

## 10) PROCEDURES/GUIDELINES AVAILABLE

What precedents, rules, instructions or procedures are available to guide or influence most of your job-related duties (i.e., policies, reference manuals, handbooks, legislation, regulations...)?

Wisconsin Statutes, City of Milwaukee Charter, Annual City of Milwaukee Budgets and City of Milwaukee Code of Ordinances legislation, GASB (Accounting Standards) and NFPA (National Fire Protection Association) standards and Fire and Police Commission, labor contracts, grant writing and reporting guidelines are the most influential precedents, rules, instructions and procedural guides for successfully completing job-related duties of the Business Finance Manager.

To what extent would you have the freedom to change or make recommendations to modify such procedures or guidelines?

There is significant freedom to recommend or make changes, within the context of labor, state, federal and municipal law. Department policies are recorded in numbered notices, subject to Fire Chief approval.

In what ways and how frequently is independent thinking required in originating new or improved operating/administrative

strategies, procedures or plans? *Please be specific and provide examples of when you have done so.*

The Fire Chief encourages innovative, creative input from direct reports, including the Business Finance Manager. For example, under my leadership, the Fire Department designed, developed and executed a training session to ensure that 280+ command officers received instructions and training on electronic time entry at no additional cost to the department for backfill or travel related training costs. Prior to executing this pilot, the department would incurred significant personnel and operating costs to train 12-15 persons per company at the Bureau of Instruction and Training.

Weekly staff and meetings with the Mayor now include reports of sick, injury, and FMLA leave in more detail, such as number of persons taken one or various combination of leaves and those hours, leaves taken by location, etc. to better evaluate and develop strategies for reducing injury and sick leave usage and related costs.

**11) PROBLEM SOLVING**

Identify the most routine and the most complex problems or issues you face while performing the duties of your position.

a) Routine problems:

Does regular ad hoc analysis as requested by senior management

b) Most complex problems:

Developing cost analyses for conceptual plans requiring use of labor, supplies and equipment. Other complex problems involve initiating and coordinating grant research, application and legislative and administrative processes and procedures.

c) To what extent are you able to identify, develop and implement alternative work methods to deal with unusual circumstances in your work? *Please provide examples.*

The Fire Chief has granted the Business Finance Manager with autonomous authority to manage all aspects of the financial and business of the Fire Department within established policies and encourages contributions from the position to refine, enhance and improve upon policies and procedures that are no longer effective in enabling the Fire Department and City of Milwaukee to prosper in the delivery of service within fiscally responsible means.

**12) CONTACTS WITH OTHERS**

Describe the purpose and frequency (daily, weekly, monthly, etc.) of any recurring contacts you have with others both within and outside your immediate work group. Give examples of specific kinds of people contacted (indicate job function or title) and indicate the purpose and frequency of those contacts.

a) Contacts with other employees within your Department other than the people you supervise:

Work With	Purpose of Contact	Frequency
Fire Chief	Develop, implement and evaluate policies, procedures and programs to assist in aligning Fire Department goals and strategies with those of the City of Milwaukee. Does regular ad hoc analysis as requested by senior management.	daily
Bureau Deputy & Battalion Chiefs	Evaluate effectiveness of pilot programs, collaborate on strategic planning, represent MFD at public meetings at Fire Chief request, Does regular ad hoc analysis as requested by senior management	daily
Bureau Managers/Supervisors	In matters of inventory control, accounts payable and payroll	weekly

b) Contacts with employees in other City departments, elected officials, Mayor's Office:

Work With	Purpose of Contact	Frequency
DOA, various Dept Heads	Work department heads and their support on various matters or fire department business and finance; DOA divisions include Budget & Mgmt Division, ITMD, Purchasing, Assessors Office.	Weekly
DER, Fire & Police Comm, Labor Negotiation	To evaluate labor contracts and their influence on internal policies, procedures and strategm for planning and developing innovative solutions to reducing sick and injury leave hours.	Bi-monthly
Comptroller	Approving accounting entries, collaborating on audits by external auditors, calculating and posting adjusting and closing entries for reporting periods, working together to create grant appropriations, work together to develop revenue forecasts and new revenue estimates.	Weekly

c) Contacts with persons outside the City, including the media:

Work With	Purpose of Contact	Frequency
Contractor, Attorneys	To manage aging accounts receivable and recommend writeoffs	often
Vendors	To provide directives for creating purchasing agreements	often
Office of Justice Assistance, Homeland Security, FEMA, Dept of Transportation	To conduct grant analysis, application, acceptance, expenditures, reporting, and close outs are mandated by the grant guidelines.	frequently

d) Other than subordinates, to whom do you provide professional advice and/or guidance?

Advice/Guidance To	Purpose of Advice/Guidance	Frequency
Bureau staff	Project management, budget briefing, and grant writing	as needed
DOA/BMD & CC/LRB Staff	Budget and policy analysis	monthly
Fire Chief	Strategy planning, forecasting, budgeting, and project mgmt	daily

e) Does your job require you to work in unpleasant work situations where it is necessary to deal with upset, hostile or threatening individuals?

Type of Person (Client, citizen, other)	Reason for Interaction	Frequency
Yes	Various; subordinates refer difficult or ill-tempered employees or vendors to the Business Finance Manager	varies

### 13) IMPACT OF POSITION

Identify any relevant information that may help measure the impact and accountability of your position using the following criteria:

- a) Responsibility for people (other than subordinates): +10
- b) Total operating and/or program budget for which you are accountable: \$101,270,396 O&M, \$3,208,000 Capital Improvement, approximately \$8.2 million federal/state/private grants and contribution accounts,
- c) Responsibility for equipment or materials: For the estimating, monitoring and reporting of all department equipment and materials budgetary appropriations.
- d) Responsibility for program development or implementation: Initiates or supports team development of programs pertaining to improving cost controls, defining strategic plansm improving labor management relations, etc.
- e) Responsibility for policy development or implementation: Initiates and refines internal policies, specifically those whose modification are due to changing federal, state and local legislation, as necessary.

- f) Responsibility for management of data or information: Is responsible for the accounting, appropriation, close out of finances entrusted to the Fire Department via adopted O&M, Capital, Grant, and Contribution authorities.

**14) CONSEQUENCE OF ERRORS**

- a) What types of problems could occur from errors made in the course of your work? (For example, loss of time or money, inconvenience to others, inaccurate reports, etc.)

Errors made in the course of my work results in loss of time, inaccurate reporting to the Mayor, Common Council, federal and state reporting agencies, and others.

- b) How quickly, or how likely, would errors in your work be detected? (For example, are errors typically identified by routine check of your work, or would errors probably not be noticed until they affected other departments or the public?)

Most errors are identified by self-checking my work addressed as matters requiring clarification or corrective followup during weekly meetings with the Fire Chief. Other errors would generally be noticed by the affected department, bureau or agency.

**15) EDUCATIONAL REQUIREMENTS**

Using the categories below, please check the level of formal education or equivalent knowledge and skill that you believe is the minimum required to perform satisfactorily in your job. State what you think is minimally required, not your own educational level. This type of knowledge and skill would typically be attained through educational institutions rather than on-the-job experience.

	<b>Formal Schooling</b>	<b>Equivalent To</b>
<input type="checkbox"/>	3-4 years of high school	Vocational or business skills, such as typing, shorthand, mechanics, drafting
<input type="checkbox"/>	1-2 years university, community college, business school, trade or technical school	More advanced knowledge of vocational or business field, including full apprenticeships
<input type="checkbox"/>	College graduation	Advanced training in a field of study such as chemistry, business, accounting, engineering, etc.
<input checked="" type="checkbox"/>	Master's degree	Advanced professional training in a well-defined field or study such as engineering, business, science, accounting
<input type="checkbox"/>	Master's degree, plus considerable additional formal education	Same as above, but more extensive in-depth study
<input type="checkbox"/>	Doctoral degree, law degree (J.D.), medical degree (M.D.)	Extensive, advanced study, including the conduct of significant, original research

**16) EXPERIENCE REQUIREMENTS**

- a) In your estimation, what is the minimum amount and type of experience required for a person possessing the minimum educational requirements to perform your job satisfactorily?

<b>Type of Experience</b>	<b>Minimum Time Required</b>	
Experience in government budgeting and strategic planningg	5 Years	6 Months
Supervising a professional staff	5 Years	0 Months
Grant writing and reporting	2 Years	0 Months

- b) What special work skills are required to enter your job?

Experience in government budgeting and forecasting. Organizational, analytic and advanced computer skills in MS Excel and database management softwares used to develop or enhance ongoing training within the organization to improve financial acumen.

- c) What special knowledge of laws, codes, or regulations are required to enter your job? (Not what you know now.)

Practical knowledge of the City of Milwaukee legislative process, State of Wisconsin

- d) Assuming that an individual has the necessary background, how long would it take for a person to be able to perform all assigned tasks competently?

The estimated time to perform all assigned tasks competently is 18-20 months.

- e) List any officially recognized certifications, licenses, authorizations to practice a trade or profession, or other required qualifications necessary for persons entering your job classification.

The United States Dept of Homeland Security mandates that this position be certified at the National Incident Management Systems IS-00700 level. The incumbent must possess at least a Bachelor's Degree in Business, Administration, Finance or Public Administration, however a Master's Degree is highly preferred.

**17) WORKING CONDITIONS**

- a) Please indicate the reason(s) and approximate percentage of time devoted to field work.

% of Time	Reasons
0.00	Field work is not primary responsibility, therefore it accounts to less than 5%

- b) Do you encounter any unpleasant, disagreeable, or potentially hazardous working conditions in the normal course of your work? (Examples: air contamination, high or low temperatures, intense or continuous noise, driving a City vehicle, exposure to hazardous materials or diseases.) *Please list those which you are exposed and the approximate percent of time you are exposed to that condition:*

% of Time	Reasons
0.00	No environmental hazardous conditions encountered for primary duties.

**18) GENERAL COMMENTS**

Please provide any other information not previously discussed that will help us understand the responsibilities of your position.

Position requires a Bachelor's degree in business/public administration, economics or related field, Master's degree preferred, experience in municipal budgeting, skills in governmental financial analysis, performance measurement, and planning with problem solving with complex organization issues and financial matters, knowledge of quantitative research methods and/or statistical and financial tools in budget or program evaluation, effective oral and written communication skills, knowledge of software applications for the analysis and presentation of programmatic and financial information.

This position prepares the Department's multi-year financial plan, compiles and analyzes budget and accounting data for various Department financial reports and supporting schedules, coordinates the budget process and performs a wide

variety of financial analysis, including financial forecasting, revenue projection, revenue analysis, modeling and cost/benefit analysis. Position also conducts rate studies, monitors grant programs, prepares cost accounting reports, and analyzes other financial applications.

Bachelors' Degree in Finance, Accounting or related field, five or more years of demonstrated success as a Finance or Accounting Manager, previous financial management experience in a governmental agency, and previous supervisory experience. Timekeeping and payroll systems and FMIS financial software or equivalent, broad knowledge of general accounting principles including GASB reporting are required. Individual needs outstanding interpersonal customer service skills.

Describe any other factors or aspects of your job that should be considered in evaluating or comparing your classification with others.

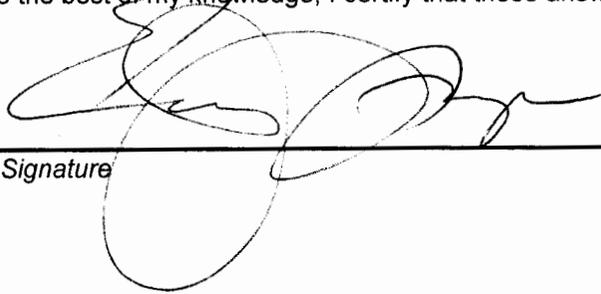
prepares the annual appropriation ordinance and supporting detail. Requirements: BS/BA in Finance, Accounting, or related field and three (3) years experience in government accounting or budgeting; or an equivalent combination of training and experience. Preferred candidate will have considerable skill in general use and design of complex interacting database systems; general use in spreadsheet, word processing and presentation applications.

The ideal candidate must be highly organized and detail oriented with excellent verbal, written and interpersonal skills.

---

**19) SIGNATURE**

To the best of my knowledge, I certify that these answers are my own, accurate and complete.

A handwritten signature in black ink, appearing to be "L. J. [unclear]", written over a horizontal line.

10/8/08

Signature

Date

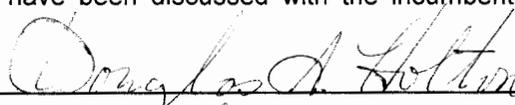


What effects, if any, would the creation, reclassification, or reallocation of this position have upon the structure of the division and work of other positions within the unit?

The reallocation of this position would work toward matching compensation and level of duties, responsibilities, and skill requirements, and also resolving a structural problems better aligning salaries of management among the fire department bureaus as well as positions throughout city government under control of the City Service Commission.

**Please check the appropriate statement:**

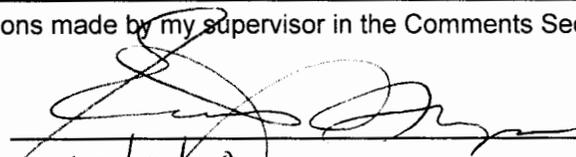
- I agree with the incumbent's Questionnaire as written.
- The above modifications have been discussed with the incumbent, and the incumbent agrees with these modifications.
- The above modifications have been discussed with the incumbent, and the incumbent disagrees with these modifications.

Supervisor's Signature: 

Title: Fire Chief

Date: October 9, 2008

I have noted the modifications made by my supervisor in the Comments Section above.

Employee's Signature: 

Date: 10/9/08

**WHEN COMPLETED, PLEASE RETURN TO:**

**Department of Employee Relations  
Compensation Services Section  
City Hall, Room 706  
ATTN: Faranda Wragg**