

VILLAGE OF UNION GROVE  
Position Description  
**Financial Director/Clerk-Treasurer**  
(Revised 08/11/2011)

**Reports To: Village Administrator/Village Board**

**FLSA Status: Exempt**

**Prepared By: Village of Union Grove Personnel**

**Approved By: Union Grove Village Board**

**Approved Date:**

**Summary**

Performs duties of the clerk as outlined in Chapter 61.25, Wis. Stats. Performs the duties of the treasurer as outlined in Chapter 61.26, Wis. Stats. Performs all duties required by law, ordinance, or at the direction of the village board. Serves as clerk for the Water & Wastewater Committee and the Union Grove-Yorkville Fire Commission.

In conjunction with the Village Administrator, the Financial Director directs the organization's financial planning and accounting practices as well as its relationship with lending institutions, Village budgets and Village Board members and the financial community by performing the following duties personally or with the assistance of subordinate employees.

**Essential Duties and Responsibilities**

- Oversees and directs treasury, budgeting, audit, tax, accounting, purchasing, real estate, long range forecasting and insurance activities for the Village and its various agencies.
- Directly supervises the Deputy Clerk Treasurer, Deputy Clerk. Carries out supervisory responsibilities in accordance with the Villages policies and applicable laws.
- Directs and coordinates the establishment of budget programs
- Coordinates tax reporting programs including payroll and property taxes.
- Oversees the collection of property taxes and prepares January tax settlement; settles all taxes with the county and other taxing jurisdictions.
- Oversees and directs the preparation of the Village budget and all other agency budgets.
- Responsible for being the custodian of funds, securities, and assets of the Village.
- Certifies road mileage with the Department of Transportation;
- Responsible for property and liability insurance renewals.
- Appraises the Village's financial position and issues periodic reports on the Village's financial stability, liquidity and growth.
- Supervise the administration of payroll/benefits
- Establishes and maintains contacts with financial institutions, and the investment community.

- Serves as designated official for the application for and administration of the recycling grant program.
- Responsible for all minutes of Village, its committees and commissions.
- Serve as custodian of the corporate seal and assure the proper use of said seal.
- Serves as chief election official, in accordance with Chapter 8, Wis. Stats, for the Village and is responsible for coordinating and conducting all elections.
- Drafts ordinance and resolutions, as necessary, for review by the Village Attorney.
- Serves on the Board of Review and performs all duties required by Wisconsin State Statutes regarding assessment of property, including filing all necessary reports with the Department of Revenue.
- Oversee compliance and issuance of liquor licenses in accordance with Chapter 125, Wisconsin State Statutes, and the issuance of all other licenses in accordance with the municipal code.
- Serves as the official custodian of all Village records, and administers the Open Records Law.
- Prepares and distributes agendas in accordance with the Open Meetings Law.
- Assist in training of new employees, planning, assigning, directing work; appraising performance; addressing complaints and resolving problems.
- Oversees cross training of employees within span of supervision
- Investigates misconduct and recommend discipline as may be necessary.
- Attends meetings as needed, requested or required.
- Other related duties as may be assigned.

### **Education and/or Experience**

1. Bachelor's degree in accounting preferred. Associate's degree (A.A.) or equivalent from a two-year College or technical school with applicable experience will be considered.
2. Must be bondable
3. Two to three years experience as a municipal clerk-treasurer or deputy clerk-treasurer.
4. Certification as a Certified Municipal Clerk (CMC), Wisconsin Certified Municipal Clerk (WCMC), Master Municipal Clerk (MMC), Wisconsin Certified Professional Clerk (WCPC), Certified Municipal Treasurer of Wisconsin (CMTW), or the desire to obtain the necessary certification.

### **Preferred Qualifications:**

To perform this job successfully an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or the ability required.

1. Be familiar with, interpret and apply organizational policies, laws, rules and regulations.

2. High degree of proficiency and accuracy in dealing with financial and accounting responsibilities. Thorough knowledge of accounting and ability to conform to generally accepted accounting practices. Ability to add, subtract, multiply, and divide in all units of measure. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs
3. Ability to effectively and tactfully present information and respond to questions of citizens, fellow workers and superiors
4. Ability to respond to common inquired or complaints from the public, regulatory agencies, or staff members
5. Ability to write business correspondence, reports, speeches and articles for presentation to public groups and the Village Board
6. Ability to solve practical and complex problems and deal with a variety of concrete variables in situations where only limited standardization exists.
7. Ability to define problems, collect data, establish facts, and draw valid conclusions.
8. Good organizational skills and ability to maintain and foster cooperative working relationship with peers, supervisors and the public.
9. Ability to set goals, plan, organize, implement, monitor, and meet deadlines independently as well as in a team setting.
10. Ability to work irregular and/or extended hours
11. The ability to utilize various computer programs to access input and retrieve information and perform a variety of record keeping functions.
12. General knowledge of computer hardware and software including software for accounting, database, Internet, inventory, payroll, project management, spreadsheet, and word processing.
13. Ability to maintain confidentiality of all Village business

### **Tools and Equipment Used**

Personal computer, including but not limited to word processing, spreadsheet, date base, typewriter, telephone, calculator, copy and fax machines

### **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

While performing the duties of this job, the employee is regularly required to sit and talk or hear. The employee is frequently required to stand; walk; use hands to finger, handle. Or feel and reach with hands and arms. The employee is occasionally required to stoop, kneel, bend, crouch, or crawl. The employee must regularly lift and or move up to 10 pounds, frequently lift and or move up to 25 pounds and occasionally lift and or move up to 50 pounds. Specific vision abilities required by this job include close vision, distance vision, and depth perception.

## **Work Environment**

The work environment characteristics described here are representative of those and employee encounters while performing the essential functions of this job.

While performing the duties of this job, the employee is occasionally exposed to moving mechanical parts, high precarious places and fumes or airborne particles. The noise level in the work environment is usually low to moderate.

## **Selection Guidelines**

Formal application, rating of education and experience; oral interview and reference check; job related tests may be required. The Village reserves the right to promote from within if qualified candidates are currently in its employ. All applicants may be required to submit to a medical examination prior to appointment, consistent with the requirements of the position. Background check of local, state or federal authorities will be conducted for all applicants.

The duties listed above are intended only as illustrations of various types of work that may be performed. The omission of specific statements or duties does not exclude them from the position if the work is similar, related or logical assignments to the position.

The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

The Village of Union Grove is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the Village will provide reasonable accommodations to qualified individuals with disabilities.

## **Salary and Benefits**

Wage as determined and approved by the Village Board.