



## Town Of Eagle

820 E Main Street  
PO Box 327  
Eagle, WI 53119  
(262) 594-5800

## CLERK/TREASURER

### JOB DESCRIPTION:

**NATURE OF WORK:** This job description is intended as an illustration of the various types of work performed by this position. Unless otherwise stated, all duties, responsibilities, and qualifications stated herein are essential functions of this position.

**PURPOSE OF POSITION:** Performs the duties of Town Clerk as contained in Wisconsin Statute 60.33 which includes keeping records of all Town business and performing election duties. Serves as Town Treasurer as contained in Wisconsin Statutes 60.34 which involves the collection, custody, investment and disbursement of the municipal funds. Serves as Office Manager for general Town administrative office and performs duties as may be assigned by the Town Board.

This position is currently assigned by the Town Board and responsible to the Town Board Chairman.

### JOB DUTIES:

The following duties are normal for this position. These are not to be construed as exclusive or all inclusive; other duties may be required and assigned.

### CLERK:

1. General
  - a. Keep municipal office open and be available for telephone inquiries during normal business hours, exclusive of holidays
  - b. File Town records in an orderly and accessible manner
  - c. Maintain the official minutes, ordinance book, bank and investments records, all other official Town records and documents, and public documents
  - d. Administer oaths
  - e. Perform notary duties
  - f. Address customer inquiries and complaints
  - g. Act as liaison between residents and the Town Board and Planning and Zoning Commission
  - h. Keep address changes current
  - i. Collect and route mail
  - j. Handle all general correspondence
  - k. Complete and return special assessment letters (this number will vary greatly depending on real estate economy and interest rates)
  - l. Assist accountant/auditor with annual audit
  - m. Perform bank statement reconciliation of all accounts monthly

- n. Order and maintain inventory of office supplies including the purchase and maintenance of office equipment
- o. Provide supervision and direction of Deputy Clerk
- p. Respond to all open records requests for items in Clerk's custody
- q. Coordination of Municipal rental of Community Room and Parks
- r. Provide information to Website Administrator

## 2. Human Resources

- a. Perform Human Resources duties including benefits management, unemployment, DSPS, Worker's Compensation, and personnel files
- b. Maintaining personnel files, performing all duties associated with new and rehires such as: administering official oaths as required by law, ensuring all new employee documentation is prepared, completed, and signed, reporting new hires to the State of Wisconsin Department of Workforce Development, entering all employee information into payroll system including personal information, wage rate, State and Federal withholdings, deductions for health insurance, Wisconsin Retirement System, direct deposit application, entering employer fringes for benefits
- c. Responsible for reviewing human resources policy manual with all new and rehired employees, reviewing with employees all benefits eligible for including health insurance, WRS, life insurance, providing annual open enrollment information and making required changes for health insurance, all required reporting and tracking of hours, wages, eligibility and termination for Wisconsin Retirement System, annual and periodic adjustments to payroll system for cost changes for benefits, wages, and withholding rates
- d. Manage property and liability insurance policies, including premium allocation, obtain Certificate of Insurance from vendors & contractors, file first report of injury and workman's compensation and short-term disability claims
- e. Assist with annual worker's compensation audit

## 3. Payroll

- a. Compile hourly employees time sheet information
- b. Complete payroll for allemployees
- c. Maintain all payroll records
- d. Make necessary payroll deductions
- e. Responsible for direct deposit payroll administration, including payments for 941
- f. File quarterly 941 reports and Department of Workforce Development reporting
- g. File monthly remittance to the WRS, State of Wisconsin withholding, and payments for employee insurance and benefits
- h. File required state and federal payroll reports monthly, quarterly and annually
- i. Make state and federal tax withholding payments in a timely manner
- j. Complete required retirement and insurance reports with the State
- k. Generate, distribute and file employee W-2s, required 1099s, and other yearend forms and reports
- l. Keep accurate accounting trail

## 4. Meetings

- a. Co-ordinate compilation and review of agenda items and informational packets with Town Chairman
- b. Prepare informational packets in a timely manner for meeting members so that informed decisions can be made

- c. Advertise meetings in compliance with the Open Meetings Law; notify media, post notices, publish notices on Town's website
- d. Email agenda and provide information packets to Town board members, Town Attorney, Engineer, and Planner in a timely manner prior to meeting
- e. Attends and records meetings of the Town Board, Board of Review, Planning and Zoning and other boards, committees and public hearings as required and produces concise and summarized record of minutes of the proceedings
- f. Accept rezone petitions, business plan of operations, and conditional use requests
- g. Coordinate publication/posting of approved Ordinances and Resolutions, as required, and coordinate the submission of Ordinances with Town Attorney to update of the Municipal Code

#### 5. Property taxes

- a. Maintain up-to-date training
- b. Review assessment roll for accuracy
- c. Maintain objection forms and set up appointments for Board of Review
- d. Attend Board of Review, acting as appointed Clerk of the Board of Review
- e. Maintain files on Board of Review hearings
- f. Prepare tax roll including calculating the Town mill rate, special assessments and charges carried onto the tax roll
- g. Responsible for filing the Statement of Assessment with the Department of Revenue
- h. Prepare and transmit all special charge information to the County
- i. Prepare items to be included on tax bills
- j. Transmit necessary information from various taxing jurisdictions to Waukesha County Tax Listing & Billing so that tax bills can be generated in a timely manner
- k. Proof tax bills to ensure accuracy prior to print vendor mailing them.
- l. Respond to inquiries from financial institutions regarding the amount of tax due by individual residents
- m. Collect tax payments through January 31 of each year
- n. Generate checks for overpayment of taxes
- o. Actively invest taxes receivable
- p. Pay school districts, lake districts, and Waukesha County their share of taxes collected in a timely manner
- q. Complete tax settlement with the Waukesha County Treasurer

#### 6. Budgeting

- a. Prepare budget worksheets for board members, to include past (3 years minimum) and current budgeted figures (i.e., eight-month actual, four-month estimate) for comparison purposes
- b. Compile all needed information for budget
- c. Keep records of all revenue sharing, transportation aids, and all other state and local aids to be figured into the budget
- d. Assist board members with completing budget worksheets
- e. Calculate mill rate based on amount needed for Town operations
- f. Prepare for Public Hearing, Special Meeting and Town Board meeting to approve the Town tax levy and the proposed budget

#### 7. Licensing and Permits

- a. Process applications and issue licenses and permits, including business, animal, liquor, special event permits, annual alcohol and cigarette license renewals and filing of all state required reports
- b. Have required background checks completed on applicants
- c. Take applications for liquor, beer, cigarette and operators licenses to Town Board for approval
- d. Keep current with ever changing liquor license law
- e. Collect and distribute fees for dog and hobby kennel licenses throughout the year
- f. Coordinate the collection of dog license fees and issuance of the license and reporting of associated information to the County
- g. Responsible for entering all Wisconsin Universal Building Permit applications into the Wisconsin Department of Safety and Professional Services system

8. Insurance

- a. Informs insurance carrier of all new equipment, vehicle purchases, and building improvements/construction
- b. Files insurance claims, including any necessary documentation with appropriate insurance carried
- c. Complete and submit annual insurance audits

9. Elections

- a. Responsible for seeing that administration, coordination, supervision of all elections, including recruitment and training of election inspectors, ensuring proper publication of all election notices as required by law, and maintaining current and accurate voter registration records
- b. Hire and train election inspectors
- c. Coordinate voter registration and absentee voting process through the State of Wisconsin WisVote system, ensuring that all updates and data entry is performed in a timely manner
- d. Stay aware of current legislation and administrative changes via the State of Wisconsin Election Commission
- e. Attend all necessary training provided by Wisconsin Election Commission and provide training opportunities for all Election Inspectors and Town staff that assist with the election process
- f. Accept absentee requests
- g. Maintain a list of absentee voters
- h. Mail and record all absentee ballots; both outgoing and incoming
- i. Pick up election materials from the Waukesha County Clerk
- j. Conduct testing (twice) of the electronic tabulator and ballot scanner used in the election
- k. Prepare municipal building for day of election
- l. Oversee and assist with all activity on election day
- m. Deliver required election materials to the County offices in a timely manner the day following the election
- n. Keep current with ever changing election law by investing in continuing education

**TREASURER:**

1. Accounts Payable

- a. Verify vendor invoices
- b. Record journal entries and appropriations
- c. Generate accounts payable report for approval of payment by Board
- d. Print and mail checks

- e. Keep accurate accounting trail

2. Accounts Receivable

- a. Charge back professional and miscellaneous fees to benefiting landowners
- b. Collect, receipt, and deposit all payments made to the Town
- c. Enter receipt information into the computer
- d. Keep accurate accounting trail

3. Finances

- a. Ensure effective and efficient use of budgeted funds by all departments by monitoring revenues and expenditures
- b. Maintain receipt records, reconcile receipts to cash, receipts in accounting system, process, report and maintain accounts receivable records
- c. Manage Town's investment portfolio, cash flow, bank deposits, borrowing, monthly and annual balance sheet and bank statement reconciliation
- d. Produce monthly treasurer's report for presentation to the Board with listing of all bank account and fund balances, expenditures, revenues, journal entries, and budget comparison
- e. Review all incoming invoices for proper expenditure coding in accounting system
- f. Produce invoices as necessary for Town expense recovery
- g. Assist auditors with annual audit of Town financials by keeping complete and accurate records, generating journal entries for proper coding, and producing all requested supporting documentation for all journal entries, accounts payable and all Town monies received by the Town

**PHYSICAL DEMANDS OF POSITION:** The demands are representative of demands that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable persons with disabilities to perform essential functions.

1. Standing, walking, sitting and stooping
2. Kneeling, crouching, balancing and bending/twisting
3. Reaching, feeling, talking and hearing
4. Handling, grasping and fingering, filing, typing, writing, etc.
5. Lifting, carrying, pushing/pulling up to 40 pounds

**WORK ENVIRONMENT:**

1. Inside office environment
2. Noise level is usually moderate
3. Exposure to atmospheric conditions, such as dust
4. Listen to emotional, often angry citizens and general public

**EQUIPMENT USED:**

1. Computer, calculator, copy machine, fax machine, telephone and automobile

2. Must have a working knowledge of the Internet, Microsoft Word, Excel, Outlook, QuickBooks

**EDUCATION/LICENSES/CERTIFICATION REQUIRMENTS:**

1. High School Diploma or GED, prior municipal experience strongly preferred, but not required
2. WCMA and MTAW Certification desirable
3. Valid Wisconsin driver's license is required
4. Ability to participate in various seminars and continuing education programs to enhance knowledge of new laws and regulations as required.

**LANGUAGE SKILLS:**

1. Skill in establishing and maintaining effective working relationships with Town officials and the general public
2. Listening skills and patience in dealing with citizens who may be upset, unhappy and/or confused
3. Ability to effectively communicate answers to citizen's questions regarding taxes, permits, licenses, etc.
4. Ability to compile clear and concise reports and research

**MATHEMATICAL SKILLS:**

1. Add, subtract, multiply and divide all units of Measure
2. Perform the four operations with like common and decimal fractions
3. Compute ratio and percent
4. Draw and interpret bar graphs and charts
5. Perform arithmetic operations involving all American monetary units
6. Collect and disburse cash in an effective manner

**REASONING ABILITY:**

1. Interpret a variety of instructions furnished in written, oral diagrammatic or schedule form
2. Ability to satisfy customer inquiries
3. Possess flexibility to perform a variety of duties as may be assigned