

POSITION DESCRIPTION QUESTIONNAIRE (PDQ)

November 2018

Your Last Name:	Hawkins
Your First Name:	Holly
Your Official Job Classification:	Accountant 2
If this form represents multiple employees, please list all other employees in this classification in the field to the right:	Not Applicable
If you are unable to locate your job title in the drop-down above, please type your job classification in the field to the right:	Not Applicable
Your Working Title (if different):	Not Applicable
Your Department:	Finance
Your Division within the Department:	Accounting
Your Supervisor's Name:	Susan Smith
Your Supervisor's Title:	Accountant 3
Date Prepared:	10/23/18

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Instructions

Segal Waters Consulting is reviewing the job descriptions for a majority of the job titles in the county to ensure they accurately reflect the work that you all do.

To assist with this analysis, we ask that you complete this questionnaire to provide information about your position. You are an important part of this project. We thank you for your effort!

EMPLOYEE INSTRUCTIONS

- 1. Please read each item carefully and enter your responses.
- 2. Complete this survey electronically in Microsoft Word. Once complete, please save the file as "[Job Title. Your last name. Your first name]-PDQ.docx".
 - a. For multiple incumbents filling out one form, please title documentation with "[job title. author last name. author first name]. Multiple PDQ.docx". Make sure to include all incumbents first initial and last names at the beginning of the form in the Your Name section.
- Email your completed PDQ to your supervisor no later than Wednesday, November 21st

1st REVIEWER INSTRUCTIONS

- 1. Ensure employees complete the PDQ by the deadline.
- 2. Review the employee's answers to each question. Employee responses should reflect their <u>current major duties</u>, not anticipated changes. Write your comments in the 1st Reviewer Comment box provided in each section and/or use the pages provided at the end of the questionnaire.
- 3. **Do not edit or change** the employee's responses. Also, do not make any comments regarding the employee's performance or personal capabilities.
- 4. Please complete your review of the questionnaire and send them to the designated 2nd Reviewer **no later than Friday, November 30th**.
- 5. We encourage you to discuss your comments with the employee.

2nd REVIEWER INSTRUCTIONS

Please review the document, add any comments in the 2nd Reviewer Section, and email the completed questionnaire to the Human Resources Department at TotalComp@piercecountywa.gov no later than Friday, December 7th.

Your Duties and Responsibilities

Basic Job Summary

Briefly describe the basic purpose of your job. This job summary should be <u>two or three sentences</u> that describe the primary responsibility and purpose of the position. The next section provides the opportunity to describe each duty and responsibility in more detail. This job description is not intended to be an exhaustive list of all duties, responsibilities or qualifications associated with the job.

Example: To receive and process incoming invoices in an efficient and timely manner. To assist vendors with billing questions and issues.

Performs moderate to complex accounting tasks for general ledger maintenance in all areas of the county, with a focus on grants; and performs tasks needed for grant funding, reporting and administration.

1st REVIEWER COMMENTS (if you have any)

This is a senior level position.

2nd REVIEWER COMMENTS (if you have any)

Instructions for the Next 7 Pages:

- In the following section, please list and describe your **most important** essential job duties and responsibilities in descending order. Start with the major duty or responsibility that takes the **greatest portion** of your time each year. It is not necessary to list every duty performed by the position unless it is integral to the job and makes up at least 5% of your time annually.
- Describe your position as it exists today, not as it was in the past or how it might be in the future.
- Please describe these major duties as if you were explaining them to a new employee who is not yet familiar with your work or with Pierce County, Washington. Please do not use abbreviations or acronyms.
- Indicate **about how often** you perform each duty (daily, weekly, etc.) and the approximate **percent of time** you spend on this duty in a typical year.
- Describe the knowledge, skills, and abilities that you think are needed to perform this duty or responsibility.
- Please use action words such as prepares, calculates, operates, etc. to start off each statement when describing your duties.



Essential Duties and Responsibilities

Describe the duty or responsibility that takes the greatest portion of your time each year.		
1. Performs general ledger maintenance, which includes analyzing		% of Time
accounts in preparation for year-end closing and discussing findings with department heads of related accounts.		50%
Approximate Frequency (check one)		
☑ Daily (or almost daily)	Semi-Annually (about 2x	a year)
☐ Weekly (or almost weekly)	☐ Annually or less often	
☐ Monthly (or almost monthly)	Other	
In your opinion, what knowledge, skills, and abiliti	<u>es</u> are needed to perform this worl	<?
Knowledge of tax rules and regulations		
Ability to interpret guidance provided by Board (GASB) and Financial Accounting		ng Standards
Knowledge of Microsoft Office Suite, acc	ounting software, and datab	ases
Knowledge of Generally Accepted Accounting Principles (GAAP)		
1st REVIEWER COMMENTS (if you have any)		
No Additional Commentary		
2 nd REVIEWER COMMENTS (if you have any)		
No Additional Commentary		

Describe the next duty or responsibility that takes	the greatest portion of your time e	each year.
2.		% of Time
Manages facets of county grants, which i transfers, accounting, reporting and coor administrators.		25%
Approximate Frequency (check one)		
☐ Daily (or almost daily)	☐ Semi-Annually (about 2x	a year)
☐ Weekly (or almost weekly)	☐ Annually or less often	
☐ Monthly (or almost monthly)	Other	
In your opinion, what knowledge, skills, and abiliti	es are needed to perform this worl	\?
Knowledge of federal grant contracts dev	elopment and compliance	
Ability to organize and maintain paper do	cuments and electronic files	3
Skill in interpreting verbal and written co	mmunication	
1st REVIEWER COMMENTS (if you have any)		
No Additional Commentary		
2 nd REVIEWER COMMENTS (if you have any)		
No Additional Commentary		
No Additional Commentary		

Describe the next duty or responsibility.		
3.		% of Time
Prepares financial reports and analysis for staff and other internal customers.	or Acounting and Finance	15%
Approximate Frequency (check one)		
☐ Daily (or almost daily)	Semi-Annually (about 2x	a year)
⊠ Weekly (or almost weekly)	Annually or less often	
☐ Monthly (or almost monthly)	☐ Other	
In your opinion, what knowledge, skills, and abiliti	es are needed to perform this worl	k?
Abiliy to present analytical findings in a c	lear and concise manner	
Skill in financial reporting		
Knowledge of Microsoft Excel and other	computer-base accounting s	systems
1st REVIEWER COMMENTS (if you have any)		
No Additional Commentary		
2 nd REVIEWER COMMENTS (<i>if you have any</i>)		
No Additional Commentary		
no realisment commonenty		

Describe the next duty or responsibility.		
4.		% of Time
Assists internal and external auditors by preconciliations, responding to audit memoregarding new or updated procedures.		5%
Approximate Frequency (check one)		
☐ Daily (or almost daily)	Semi-Annually (about 2x	a year)
☐ Weekly (or almost weekly)	☐ Annually or less often	
☐ Monthly (or almost monthly)	Other	
In your opinion, what knowledge, skills, and abilities	es are needed to perform this worl	k?
Ability to meet schedules and deadlines of	f the work	
Ability to compare data from a variety of s	ources for accuracy and co	mpleteness
Ability to maintain well-organized materials, files, systems and tools.		
1st REVIEWER COMMENTS (if you have any)		
No Additional Commentary		
2 nd REVIEWER COMMENTS (if you have any)		
No Additional Commentary		

Describe the next duty or responsibility.		
5.		% of Time
Reviews monthly expenditures of department compliance with budget and analyzes sig		5%
Approximate Frequency (check one)		
☐ Daily (or almost daily)	☐ Semi-Annually (about 2x	a year)
☐ Weekly (or almost weekly)	☐ Annually or less often	
Monthly (or almost monthly)	Other	
In your opinion, what knowledge, skills, and abilitie	es are needed to perform this work	<?
Ability to organize large volumes of detail	ed data and information	
Knowledge of accounting codes		
Knowledge of Microsoft Excel and other of	computer-base accounting s	ystems
1st REVIEWER COMMENTS (if you have any)		
No Additional Commentary		
2 nd REVIEWER COMMENTS (if you have any)		
No Additional Commentary		

Describe the next duty or responsibility.		
6.		% of Time
Approximate Frequency (check one)		
Daily (or almost daily)	Semi-Annually (about 2x	a year)
☐ Weekly (or almost weekly)	Annually or less often	
☐ Monthly (or almost monthly)	Other	
In your opinion, what knowledge, skills, and abilities	<u>es</u> are needed to perform this work	(?
	<u> </u>	
1 st REVIEWER COMMENTS (if you have any)		
2 nd REVIEWER COMMENTS (if you have any)		

Describe the next duty or responsibility.		
7.		% of Time
Approximate Frequency (check one)		
_		,
Daily (or almost daily)	Semi-Annually (about 2x	a year)
Weekly (or almost weekly)	Annually or less often	
☐ Monthly (or almost monthly)	☐ Other	
In your opinion, what knowledge, skills, and abilities	<u>es</u> are needed to perform this work	(?
1st REVIEWER COMMENTS (if you have any)		
2 nd REVIEWER COMMENTS (if you have any)		
Z REVIEWER CONTINIENTS (II you have any)		

Supervisory Responsibilities

Do you have formal supervisory responsibilities over any other employees? Please indicate the nature of supervision performed by this job by selecting the most applicable from the drop-down options in the table below via the third column.

Na	Nature of Supervision	
1	Job has no responsibility for the direction or supervision of others.	
2	Work requires providing guidance and operates as a <u>lead worker</u>. This position may oversee work quality, training, instructing and work assignments.	
3	Work requires <u>supervising</u> and monitoring performance for a regular group of employees (2 or more full-time employees) including providing input on hiring/disciplinary actions and work objectives/ effectiveness, performance evaluations and realigning work as needed.	2. Lead worker
4	Work requires managing and monitoring work performance of a business unit (i.e. Human Resources), division, or key work area including evaluating program/work objectives and effectiveness, establishing broad organizational goals and realigning work and staffing assignments for the department.	

What is the degree of complexity of the work performed by those being supervised?

De	Degree of Complexity	
А	Semi-complex - The jobs or tasks of the group are in a somewhat technical or advanced activity where work methods are fairly well-established.	
В	Complex - The jobs or tasks of the group are typically in an advanced field of activity where work methods follow only generally standardized processes.	A

If in the 'Nature of Supervision' table above option 4 or higher was selected, please list number of positions that this classification typically has responsibility over by employee type, the job titles and names of incumbents in the titles you supervise.

Employee Types	# of Positions
Regular Full-Time Exempt	
Regular Full-Time Non-Exempt	
Regular Part-Time	
Part-time, Seasonal or Temporary	

Job Title	Names of Employees within Job Title
Example: Senior Accountant	Sam Knox, Heather Peterson

Employee additional notes or comments, if you have any.

1st REVIEWER COMMENTS (if you have any)

This position does not supervise, but is a lead/mentor.

2nd REVIEWER COMMENTS (if you have any)

Minimum Job Requirements

Job-Related Work Experience

In your opinion, what is the lowest (minimum) level of job-related work experience that should be <u>required</u> of any new employee in this position?

Years of Job Related Work Experience

Years of Experience: 3 to 5 year's experience

List any specific types of experience you think should be required for new employees in your job. For example: Experience resolving past due accounts

Type of Job Related Work Experience

Specific Type of Experience: **Progressively responsible accounting experience**, **preferably in the public sector**

Level and Type of Education

In your opinion, what is the lowest (minimum) level of education that should be required of any new employee in this position?

Level of Education

Education: Bachelor's Degree

List any specific types of education you think should be required or preferred for new employees in your job. For example: Bachelor's degree in Accounting, Finance, or Business

Type of Education

Specific Type of Education: **Accounting or Finance**

Licenses and Certifications

Does your job <u>require</u> a Professional Skilled Trade License, Certification, or Registration to perform this work (e.g. CPA, electrician's license, Microsoft certification, etc.)?

CPA

Does your job require you to have a Driver's License?

No

1st REVIEWER COMMENTS (if you have any)

A CPA would be desirable, but not required at this level.

2nd REVIEWER COMMENTS (if you have any)

Agree with comment above.



Discretion and Independent Judgment

Does your job involve using discretion and independent judgment? See examples below.

No

Examples of discretion and independent judgment may be:

- Making decisions that affect the overall policies of the department or Pierce County.
- Ability to depart from standards or division/department protocols without prior approval.
- Forming recommendations regarding changes to departmental policies or standards.
- Participating significantly in the formation of policies for the department.
- Providing consultation or expert advice to Pierce County's senior leadership.
- Planning long-term or short-term business objectives.
- Representing Pierce County in handling complaints, arbitrating disputes or resolving grievances.
- Investigating and/or independently resolving matters of significance on behalf of Pierce County.
- Committing Pierce County in matters that have a significant financial impact (such as decisions that bind Pierce County to pay for significant purchases).

Discretion and independent judgment is **NOT**:

- Making recommendations by collecting facts concerning compliance with standards or regulations.
- Applying technical knowledge to follow procedures (or to decide which procedures to follow).
- Determining whether specific regulations or policies have been followed or completed.
- Performing skilled secretarial or administrative assistant work.
- Handling large amounts of cash.
- Tabulating data, conducting research or collecting facts and information.
- Making decisions that <u>do not</u> commit Pierce County in matters that have significant financial impact.

If you checked Yes, give at least <u>two examples</u> of the kinds of decisions or actions that require you to use discretion and independent judgment on the job.

1st REVIEWER COMMENTS (if you have any)

No Additional Commentary

2nd REVIEWER COMMENTS (if you have any)

Freedom to Act and Impact of Actions

Select the option that best describes the extent you are free to act in the absence of supervision or standard operating policies or procedures.

	Description	
1	Receives Immediate Direction You normally perform assignments after receiving detailed instructions as to methods, procedures, and desired end results with little room for deviation. The immediate supervisor may, at times, provide close and constant review.	
2	Receives Procedural Direction You normally perform assignments after receiving general instructions as to methods, procedures, and desired end results. There is some opportunity for discretion when making selections among a few, easily identifiable choices. The assignment is usually reviewed upon completion.	
3	Receives General Direction You normally perform the job by following established standard operating procedures and/or policies. There is a choice of the appropriate procedure or policy to apply to duties. Performance reviewed periodically.	General Direction
4	Receives Limited Direction You normally perform assignments according to your own judgment, requesting supervisory assistance only when necessary. Special projects are managed with little oversight and assignments may be reviewed upon completion. Performance reviewed periodically.	
5	Receives Administrative Direction You normally perform assignments within broad parameters defined by general organizational requirements and accepted practices. End results determine effectiveness of job performance.	

To what degree does achieving or mishandling of the situation by the job incumbent affect financial, public, or employee relations aspects of the organization?

lm	Impact of Actions	
А	Moderate - Moderate benefits or costs in time, money, or public/employee relations are achieved or lost.	
В	Significant - Considerable benefits or costs in time, money or public/employee relations are achieved or lost.	A

Provide specific meaningful examples of the type of decisions made by this job title and the types of decisions referred to a Supervisor or Manager.

Examples of Decisions made by employees in this classification:

Which assets to capitalize, unless there is a high degree of uncertainty

How to code accounting transactions

Examples of Decisions that employees in this classification would refer to the Supervisor or Manager:

Any situation with a high degree of uncertainty or a lack of established guidance

Changes to established processes

1st REVIEWER COMMENTS (if you have any)

No Additional Commentary

2nd REVIEWER COMMENTS (if you have any)



Fiscal Responsibility

Select the option that best describes the accountability and participation, if any, as it relates to the fiscal accountability for your department or assigned area(s) of responsibility.

Des	cription	
1	Position has no fiscal responsibility .	
2	Position has limited fiscal responsibility . May assist in the collection of data in support of recommendations for departmental budget allocations. May monitor division or program/promotional level budget and expenditures.	
3	Position has moderate fiscal responsibility. May be responsible for the billing, collection and/or accounting of funds. May be responsible for the handling and balancing of cash.	
4	Position has major fiscal responsibility. Is responsible for department-wide financial decisions. Assures that appropriate linkages exist between budget requests and departmental goals and objectives. Monitors budget plan and adjusts as necessary.	Limited fiscal responsibility
5	Position has assigned division and/or agency-wide fiscal responsibility. Assures that appropriate linkages exist between division and agency-wide budget, funding limitations and services levels, to meet specific division/departmental and organizational goals. Monitors progress toward fiscal objectives and adjusts plans as necessary to reach them. May prepare financial statements and budget reports.	

1st REVIEWER COMMENTS (if you have any)

This position has moderate fiscal responsibility (3)

2nd REVIEWER COMMENTS (if you have any)

Agree with comment above

Technical Skills

This factor measures the technical job difficulty in terms of the application of the technical skill required by the job. Select the option that best describes the job's required skill level and application of those skills.

Le	vel of Technical Skill Requirements	
1	Standardized Skill Requirements: Work requires the use of standard technical skills appropriate to the work environment of the organization.	
2	Moderate Skills in a Technical Field: Work requires a comprehensive, practical knowledge of a technical field with use of analytical judgment and decision-making abilities appropriate to the work environment of the organization.	2. Moderate skills
3	Advanced Skills and Knowledge: Work requires advanced skills and knowledge in approaches and systems, which affect the design and implementation of major programs and/or processes organization-wide. Independent judgment and decision-making abilities are necessary to apply technical skills effectively.	

1st REVIEWER COMMENTS (if you have any)

This position requires moderate skills (2). Advance knowledge of excel is preferred to turn data into information. The understanding and implementation of processes is also important.

2nd REVIEWER COMMENTS (if you have any)

Human Collaboration

Please indicate the interaction category that best describes your position from the drop-down in the third column.

Human Collaboration	Description of Requirement	Please Select One:
Interaction 1	Work requires regular interaction involving exchange and receipt of information.	
Interaction 2	Work may require providing advice to others outside direct reporting relationships on specific problems or general policies. Contacts may require the consideration of different points of view to reach agreement. Elements of persuasion may be necessary to gain cooperation and acceptance of ideas.	
Interaction 3	Interaction 2	
Interactions and communications may result in recommendations regarding policy development and implementation. May also evaluate customer satisfaction, develop cooperative associations and utilize resources to continuously improve customer satisfaction.		
Interaction 5	Communications and discussions may result in decisions regarding policy development and implementation. Interaction with others outside the organization requires exercising participative management skills that support team efforts and quality processes.	

Please indicate the titles and/or types of people (i.e. General Public, Community Leaders, Board Members, etc.) you interact with and how often you interact with them below. (Coworker titles can be included as it relates to work responsibilities.)

Titles/Types of People	Amount of Interaction (daily, weekly, monthly, yearly)
Department Managers	Monthly
Accounting Staff	Weekly

1st REVIEWER COMMENTS (*if you have any*)

No Additional Commentary

2nd REVIEWER COMMENTS (*if you have any*)

No Additional Commentary

Physical Requirements

Please indicate the level of physical effort required by this position.

Physical Demands	Description	Please Select One:
Sedentary Work	Exerting up to 10 pounds of force occasionally, a negligible amount of force frequently, or constantly having to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time, with common physical demands involving desk or office related work. Jobs are sedentary if walking and standing are required only occasionally and incumbents only exert up to 10 pounds of force occasionally.	
Light Work Exerting up to 20 pounds of force occasionally, up to 10 pounds of force frequently, and/or a negligible amount of force constantly having to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for the Sedentary Work category and the worker sits most of the time, the job is rated Light Work.		Sedentary Work
Medium Work Exerting up to 50 pounds of force occasionally, up to 20 pounds of force frequently, and/or up to 20 pounds of force constantly having to move objects.		
Heavy Work	Exerting up to 100 pounds of force occasionally, up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly having to move objects.	

1st REVIEWER COMMENTS (if you have any)
No Additional Commentary

2nd REVIEWER COMMENTS (if you have any)

Working Conditions

Work Environment or Locations

Select the drop-down option that best describes the job's work environment. Where working conditions vary with specified work assignments the degree selected must represent the average of all the conditions encountered.

Work Environment/Locations	Please Select One:
Good: Relatively free from unpleasant environmental conditions or hazards. Office environment.	
Satisfactory: Occasional exposure to unpleasant environmental conditions and/or hazards. Occasional outside work.	Good Conditions / Office Environment
Disagreeable: Frequent exposure to unpleasant environmental conditions and/or hazards. Majority of work performed outside or with exposure to risk.	

Employee notes or comments regarding work environments, if you have any.

1st REVIEWER COMMENTS (*if you have any*)

No Additional Commentary

2nd REVIEWER COMMENTS (if you have any)

Exposures

Indicate how often your work requires you to be exposed to the following from each drop-down box.

Exposures	Frequency Working in Designated Environment
Individuals who are hostile or irate	Seldom or Never
Extreme cold (below 32 degrees)	Seldom or Never
Extreme heat (above 100 degrees)	Seldom or Never
Communicable diseases	Seldom or Never
Moving mechanical parts	Seldom or Never
Fumes or airborne/blood borne	Seldom or Never
Toxic or caustic chemicals or substances	Seldom or Never
Loud noises (85+ decibels such as heavy trucks, construction)	Seldom or Never
Other	Choose an item.

Employee notes or comments regarding work exposures, if you have any.

1st REVIEWER COMMENTS (if you have any)

No Additional Commentary

2nd REVIEWER COMMENTS (if you have any)

Job Family Differences

If your job is part of a job family (example: Customer Service Specialist I, II, or III), please note the other positions in the series and tell us what you think is the primary difference between your job and others in the job family.

Position Titles in Job Family	Primary Difference between Your Job and Others in Job Family
Accountant 1	Entry level, fewer years of experience required than level 2
Accountant 2	Intermediate level requiring a more in depth knowledge and experience in general ledge maintenance and financial reporting.
Accountant 3	Supervises level 1 and 2 accountants. Performs hiring / firing and disciplinary actions. Requires an in depth knowledge and ability to handle complex accounts / issues

1st REVIEWER COMMENTS (if you have any)

No Additional Commentary

2nd REVIEWER COMMENTS (if you have any)

Thank you for taking the time to tell us about your job!

Please save the file as "[job title. your last name. your first name] – PDQ.docx" For example, if your name is John Doe and your job title is Secretary, save the file as Secretary.Doe.John – PDQ.docx.

For multiple incumbents filling out one form, please title documentation with "[job title. author last name. author first name].Multiple - PDQ.docx." Make sure to include all incumbents first and last names on the front page of the form.

Then email your completed questionnaire to <u>your reviewer</u> no later than **Wednesday**, **November 21**st.



1st Reviewer Section

To be completed by the 1st Reviewer of the individual(s) who completed the questionnaire.

1st Reviewer Name:	Susan Smith
1st Reviewer Title:	Accountant 3

1. What do you think is the most appropriate job title for this position?

If you think the current title is the most appropriate, enter "same as current."

If this questionnaire includes responses from multiple employees, indicate the title that you think is appropriate for each individual position.

Senior Accountant

2. Please review the employee's responses and write any comments in the "1st Reviewer Comments" section on each page.

We encourage you to share your responses with the employee; however, please do not change anything that the employee has written. Also, please **do not** make any comments regarding the employee's performance or personal capabilities.

3. Please tell us anything else you think we should know about this position.

No Additional Commentary

Please email the completed questionnaire to the 2nd Reviewer no later than **Friday**, **November 30th**.

2nd Reviewer Section

To be completed by the 2nd Reviewer of the individual(s) who completed the questionnaire.

2 nd Reviewer Name:	Linda Taylor
2 nd Reviewer Title:	Chief Accountant

1. What do you think is the most appropriate job title for this position?

If you think the current title is the most appropriate, enter "same as current."

If this questionnaire includes responses from multiple employees, indicate the title that you think is appropriate for each individual position.

Senior Accountant

2. Please review the employee's responses and write any comments in the "2nd Reviewer Comments" section on each page.

We encourage you to share your responses with the employee; however, please do not change anything that the employee has written. Also, please **do not** make any comments regarding the employee's performance or personal capabilities.

3. Please tell us anything else you think we should know about this position.

No Additional Commentary

Please email the completed questionnaire to the employee who originated the questionnaire as well as to the Human Resources Department at **TotalComp@piercecountywa.gov** no later than **Friday**, **December 7**th.