



PALM BAY POLICE & FIRE PENSION FUND

JOB TITLE: PART TIME OFFICE CLERK

GENERAL STATEMENT OF JOB

Part time clerical position reporting to the Palm Bay Police & Firefighters' Board of Trustees performing a variety of clerical duties. Work involves composing and typing a variety of documents, scheduling meetings, maintaining calendars, screening and independently answering telephones, addressing inquiries from service providers, Plan members and the general public, setting up and maintaining a filing system, performing highly responsible, professional work in executing the decisions of the Board of Trustees.

SPECIFIC DUTIES AND RESPONSIBILITIES

ESSENTIAL JOB FUNCTIONS

Types correspondence, reports, contracts, memos, forms, and other material into form from typed or handwritten copy, assuming responsibility for spelling, punctuation, grammar, and format; proofreads various forms and documents, ensuring proper content, spelling, punctuation, grammar, and format. May compose basic correspondence for the Board of Trustees. May copy materials and manuals.

Performs data entry using computer software related to active and retired Plan members and pension activities. Assists in periodic special projects.

Answers telephone and receives inquiries, providing information to the general public concerning board activities, or referring callers to appropriate trustee(s) or agencies, as necessary; records and routes messages to appropriate area, as necessary. Receives, opens and distributes mail and faxes.

Files and retrieves materials; prepares photocopies of various materials and distributes as requested or otherwise appropriate. Maintains retirement system files and verifies for completeness. May prepare and files for archive in accordance with public records and pension retention laws. Organizes and records department reports for storage.

Assists board members with researching and providing requested information. Assists in preparing background materials for agendas and other records and documents as necessary, in preparation of meetings.

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May perform basic bookkeeping functions, including verifying biweekly employee contribution deposits and annual employer contribution deposits, as well as posting such deposits to pension software programs, preparing warrants for board signature, preparation of invoices, warrants and associated reports for forwarding to the board's financial institution for remittance and distribution, as well as forwarding similar documentation to the board's accountant. Orders office supplies as needed. Researches balance discrepancies and payment credits. Communicates and interacts with service providers, as directed by the board.

May maintain spreadsheets used to track various operations. Schedules travel and prepares associated paperwork for board members.

Assists in the preparation of documentation for the board custodian, accountant, auditor, attorney, actuary and Division of Retirement representatives for the annual independent audit, annual report to the Division of Retirement, actuarial valuation Reports, impact studies & statements, beneficiary changes for active and retired Plan members , employee benefit statements, Summary Plan Descriptions, retirement applications, new and terminated Plan members, Deferred Retirement Option Program (DROP), cost-of-living allowances (COLA), retirement applications, buy-back of prior service and reporting, annual retiree and disability affidavits, and in researching and preparing disability, forfeiture, and death claims.

ADDITIONAL JOB FUNCTIONS

Performs other related work as required.

The listed duties are only illustrative and are not intended to describe every function that may be performed by this job class. The omission of specific statements does not preclude board members from assigning specific duties not listed if such duties are a logical assignment to the position.

MINIMUM TRAINING AND EXPERIENCE

Graduation from high school, supplemented by course work in secretarial science and 1 year of experience in secretarial and administrative work; and use of computer-driven word processing, spreadsheet, and file management programs, or any equivalent combination of training and experience that provides the required knowledge, skills, and abilities. Ability to operate standard office equipment. Computer skills to include experience with MS Word, Excel, Databases, Power Point, or similar programs. Ability to work on the Internet and familiar with web-based programs. Typing speed: 35 WPM. Must possess a valid Florida's Driver's License and have an acceptable driving record and maintain an acceptable driving record.

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MINIMUM QUALIFICATIONS OR STANDARDS REQUIRED TO PERFORM ESSENTIAL JOB FUNCTIONS

Physical Requirements: Must be physically able to operate a variety of automated office machines including computers, telephone, copiers, facsimile machines, printers, calculators, postal equipment, etc. Must be able to exert a negligible amount of force frequently or constantly to lift, carry, push, pull, climb, bend, kneel, reach or otherwise move objects. Sedentary work involves sitting most of the time, but may involve walking or standing for brief periods of time. Jobs are sedentary if walking and standing with some bending, kneeling, reaching, lifting required only occasionally and all other sedentary criteria are met.

Data Conception: Requires the ability to compare and/or judge the readily observable, functional, structural, or composite characteristics (whether similar to or divergent from obvious standards) of data, people or things.

Interpersonal Communications: Requires the ability to speak and/or signal people to convey or exchange information. Includes receiving instructions, assignments and/or directions from the Board of Trustees. Good interpersonal abilities with the ability to get along and interface with diverse personalities and profession disciplines. Ability to communicate with all age groups.

Language Ability: Requires the ability to read a variety of correspondence, reports, forms, manuals, etc. Requires the ability to prepare correspondence, reports, forms, meeting agendas, etc., using prescribed formats and conforming to all rules of punctuation, grammar, diction, and style. Requires the ability to speak to people with poise, voice control and confidence.

Intelligence: Requires the ability to apply rational systems to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists; to interpret a variety of instructions furnished in written, oral, diagrammatic, or schedule form.

Verbal Aptitude: Requires the ability to record and deliver information, to explain procedures, to follow oral and written instructions. Must be able to communicate effectively and efficiently in standard English.

Numerical Aptitude: Requires the ability to utilize mathematical formulas; to add and subtract totals; to multiply and divide; to determine percentages and decimals.

Form/Spatial Aptitude: Requires the ability to inspect items for proper length, width and shape.

Motor Coordination: Requires the ability to coordinate hands and eyes rapidly and accurately in using automated office equipment.

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Manual Dexterity: Requires the ability to handle a variety of items such as office equipment. Must have minimal levels of eye/hand/foot coordination.

Color Discrimination: Does require the ability to differentiate between colors on files, forms and color copying.

Interpersonal Temperament: Requires the ability to deal with people beyond giving and receiving instructions. Must be adaptable to performing under stress and when confronted with persons acting under stress. High energy level, comfortable performing multi-faceted projects in conjunction with day-to-day activities.

Physical Communication: Requires the ability to talk and/or hear: (talking: expressing or exchanging ideas by means of spoken words; hearing perceiving nature of sounds by ear). Must be able to see, read, handle or feel objects and controls. Must be able to communicate via telephone.

PERFORMANCE INDICATORS

Knowledge of Job: Has considerable knowledge of the Plan and board rules, regulations, policies and procedures, and the ability to interpret them. Has considerable knowledge of the organization and functions of the Plan. Has considerable knowledge of modern office practices and procedures. Has considerable knowledge of arithmetic, spelling, grammar, punctuation and vocabulary. Is skilled in the operation of common office equipment, including popular computer-drive word processing, spreadsheet and file maintenance programs. Is able to research program documents and narrative materials, and to compile reports from information gathered. Is able to make routine administrative decisions independently in accordance with laws, regulations, and board policies and procedures, and to solve problems and answer questions. Is able to maintain confidentiality of active and retired member information. Is able to develop and modify work procedures, methods and processes to improve efficiency. Is able to communicate effectively orally and in writing. Is able to establish and maintain effective working relationships as necessitated by work assignments.

Quality of Work: Maintains high standards of accuracy in exercising duties and responsibilities. Exercises immediate remedial action to correct any quality deficiencies that occur in areas of responsibility. Maintains high quality communication and interacts with the Board of Trustees, vendors and the general public. Ability to work independently and collaboratively. Ability to work with detailed technical information and actuarial and legal terminology.

Quantity of Work: Maintains effective and efficient output of all duties and responsibilities as described under "Specific Duties and Responsibilities."

Dependability: Assumes responsibility for doing assigned work and meeting deadlines. Completes assigned work on or before deadlines in accordance with directives, standards and

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prescribed procedures. Accepts accountability for meeting assigned responsibilities in the technical, human and conceptual areas. Results, service, detail and people-oriented. Ability to be diplomatic and meet deadlines. Demonstrate a high level of integrity and loyalty to the interests of the Pension Fund.

Attendance: Attends work regularly and adheres to board policies and procedures regarding absences and tardiness. Provides adequate notice to the board with respect to vacation time and time-off requests.

Initiative and Enthusiasm: Maintains an enthusiastic, self-reliant and self-starting approach to meet job responsibilities and accountability. Strives to anticipate work to be done and initiates proper and acceptable direction for completion of work with a minimum of supervision and instruction.

Judgment: Exercises analytical judgment in areas of responsibility. Identifies problems or situations as they occur and specifies decision objectives. Identifies or assists in identifying alternative solutions to problems or situations. Implements decisions in accordance with prescribed and effective policies and procedures and with a minimum of errors. Seeks expert or experienced advice and researches problems, situations and alternatives before exercising judgment.

Cooperation: Accepts board instruction and direction and strives to meet the goals and objectives of same. Questions such instruction and direction when clarification of results or consequences are justified, i.e., poor communications, variance with board procedures, etc. Offers suggestions and recommendations to encourage and improve cooperation between all staff persons within the office.

Relationships with Others: Shares knowledge with the board for mutual benefit. Contributes to maintaining high morale. Develops and maintains cooperative and courteous relationships with the board, Plan members and representatives from other organizations, and the general public so as to maintain good will and project a good board image. Tactfully and effectively handles requests, suggestions and complaints from the board and Plan members in order to maintain good will within the Plan. Interacts effectively with the board, Plan members, service providers and the general public.

Coordination of Work: Plans and organizes daily work routine. Establishes priorities for the completion of work in accordance with sound time-management methodology. Avoids duplication of effort. Estimates expected completion time of elements of work and establishes a personal schedule accordingly. Attends meetings, planning sessions and discussions on time. Implements work activity in accordance with priorities and estimated schedules. Maintains a calendar for meetings, deadlines and events.

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Safety and Housekeeping: Adheres to all safety and housekeeping standards established by the Board and government regulatory agencies. Sees that the standards are not violated. Maintains a clean and orderly workplace.