

LCBPOA, INC.

Job Description: Clerk

Job Overview: To maintain Association Clerk's office. This is a Part-time position (4 hrs. a week).

**Performance Review:** This position is a direct report to the Treasurer. Performance review will be conducted every year in February by the Treasurer.

**KNOWLEDGE, SKILLS, ABILITIES AND OTHER CHARACTERISTICS:**

**Technical**

Knowledge of proper spelling, grammar, and punctuation; knowledge of proper English writing mechanics and the ability to proofread documents and reports.

Knowledge of general office procedures, systems and terminology.

Ability to read and understand work-related documents.

Proficiency using the basic features of word processing and e-mail software to type correspondence, memos and reports.

Ability to learn new computer programs/software.

Ability to remain focused on details.

Ability to accurately maintain numerical and alphabetical filing systems.

Ability to organize and complete work assignments in a timely manner.

Ability to perform basic mathematical calculations to be able to double-check invoices, statements and supply orders.

Ability to follow instructions.

**Customer Service and Interpersonal**

Ability to display empathy and tact to serve the public and represent the Association positively.

Ability to effectively communicate with and maintain effective working relationships with the Executive Officers, Directors, and the general public.

Teamwork skills and ability to work co-operatively with people whose backgrounds may differ from one's own.

Ability to analyze work-related situations carefully and adopt effective courses of action in a timely manner.

Ability to maintain composure and work accurately in high pressure situations.

Ability to maintain confidentiality with interactions and legal documents.

Ability to work co-operatively and efficiently with co-workers, and residents whose backgrounds may differ from one's own.

**Responsibilities for Clerk:**

1. Maintain Clerk office hours at the LCBPOA Clubhouse. Office hours are: Wednesday 4:00-6:00 p.m., Saturday 10:00 a.m.-Noon and Monday 4:00 p.m.-6:00 p.m. (April & May Only) and additional hours as needed.

2. After the Treasurer has prepared all invoices containing the Assessment fees, the Clerk shall prepare the invoices for mailing and mail in March each year.

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3. Bill and collect all Parking/Beach pass fees, pier fees, pier auction fees and other fees established by the Board of Directors. The Clerk will issue the Parking/Beach passes upon receipt of the fee. The Clerk shall prepare and mail passes upon request.
4. Record and receive monies due and payable to the Association for assessments, parking/beach fees, pier fees and pier auction fees. The Clerk shall produce and maintain receipt for every financial transaction performed on behalf of the Association. The Treasurer receives and receipts all monies for Clubhouse Rentals, donations, bar receipts and any monies received from Clubhouse events.
5. The Clerk is required to receipt all monies (see above) and provide the Treasurer and Secretary a report of all receipts. The Pier Committee receives a copy of all reports containing pier monies.
6. In Quick Books, maintain a current record of the Association members in a form that permits preparation of list of names and address of property owners/members by District. The Clerk shall record all telephone numbers and email addresses when provided by members. The Clerk shall record all pier holders and pier waiting list applicants. The Clerk shall prepare, record and file with Walworth County all liens and lien releases. Any requests for District reports needs Board of Directors approval. The Clerk must be given 1 business week to produce the requested report and request needs to be in writing. The Clerk shall be allowed additional hours to produce the reports.
7. At Board and Bi-Annual meetings, the Clerk confirms that members in attendance are in good standing.
8. The Clerk keeps a log of all emails and voicemails received and the responses to each.
9. The Clerk, on a monthly basis, receives a report of all property transferred within the Association from Walworth County. The Clerk shall record these changes.
10. The Clerk shall record and file all Foreclosure or Bankruptcy files received.
11. After the Treasurer has prepared all invoices containing late fees the Clerk shall prepare them for mailing and mail.
12. The Clerk shall prepare a Clerk's Report to be presented by the Treasurer at all Board meetings.
13. The Clerk shall create a report containing all monies, received by the Clerk, all the Homeowners Request Reports and all reports requested to be presented at the monthly Board meetings.

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14. The Clerk shall complete all Homeowner request reports by Realtors, Title Companies, Mortgage Lenders and members and maintain a file.
15. The Clerk shall prepare a report showing a New Owner, the address of the Association property, give each of the Directors in that District a copy along with Postcard and maintain a file.
16. The Clerk shall prepare all checks written by the Treasurer for mailing, mail and file all copies of paid bills that were mailed.
17. The Clerk shall deliver to each Director, upon request, keys to the Clubhouse and Office and maintain a file.
18. The Clerk shall, upon request, assign a Security Code to each Director and all others approved by the Board and maintain a file.
19. The Clerk shall, when the Directors have created and approved, make copies of the yearly calendar to be included with the mailing of the assessment dues invoices.
20. The Clerk shall, when submitted, make copies of the Annual President's letter to be included with the mailing of assessment dues invoices.
21. The Clerk shall maintain and order all office supplies as necessary and notify the Treasurer of all purchases.
22. The Clerk shall lock all monies received, in the safe, to be deposited to the bank by the Treasurer.
23. The Clerk shall, when approved, make copies of the "Beach Book", staple and give to the Beach Attendant for distribution.
24. Other duties as assigned.