

# **WEDGEFIELD PLANTATION ASSOCIATION POLICY MANUAL**

## **JOB DESCRIPTION** **WPA OFFICE CLERK**

**REPORTS TO:** Board of Directors

**IMMEDIATE SUPERVISOR:** Board Corporate Secretary

**JOB STATUS:** Part Time Employee of Association, No Benefits

### **QUALIFICATIONS:**

Must be PC literate, know full accrual accounting, budgeting, and financial reporting, and have basic receptionist/secretarial skills (shorthand not required). Must be able to learn computerized accounting system and integrated general ledger/data base package. Should have good verbal and written communication skills. Must be bondable.

### **DESIRABLE TRAITS:**

Must be personable, friendly, cordial, tactful, and discreet. Must be reliable and enthusiastic. Must require little supervision.

### **PRIMARY FUNCTIONS:**

Man office, answer phones, maintain resident files, open and record mail, accept and transmit faxes, handle all computer data entry, perform all accounting functions including general ledger, accounts payable, accounts receivable and all financial and government reporting. Handle walk-in resident and contractor contact (answering questions, handing out forms, and referring individuals to the proper committee and board members.)

### **SPECIFIC DUTIES:**

1. Man office for a minimum of 26 hours per week. Open hours to be set by the Board.
2. Answer phone, log calls, and refer to appropriate Board member for resolution of matter.
3. Process all incoming correspondence and date stamp on the day received. (Rev.10/20/20)
4. Maintain all computer databases, records on all lot owners, condo owners, as requested.
5. Maintain all records on Refundable Builder Deposits.
6. Prepare yearly Annual Meeting Reports and mailings with the guidance of the Board Secretary.
7. Check "Georgetown Times" and other papers for notice of "Sale of Property" or "Transfers of Property" to keep database updated.

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8. Issue Vehicle Stickers, Marina Cards & Boat Trailer Stickers and record pertinent information in resident file.
9. File and maintain vendor contracts, and maintenance agreements, to include renewal and expiration date.
10. Issue “Architectural Review Packets” to builders and lot owners. Collect fees and forward to CPA.
11. Prepare labels for “Wragg Mailings” and all other special mailings.
12. Take all outgoing mail to the Post Office.
13. Make weekly trips to CPA office for pickup and delivery (if applicable).
14. Filing and performing all other duties inherent with this position.
15. Maintain and order all office supplies.
16. Fulfill individual requests of all Board Members.
17. Maintain Petty Cash and purchase on as need basis.
18. Prepare for and attend Monthly and Annual Meetings to record notes as directed by Board Members.
19. Transcribe Monthly and Annual Meeting Board Minutes and distribute to Board Secretary for approval.
20. Maintain Office Building Usage and Fees