

CCOA Office Administrator Job Description & Procedures  
April, 2019

All office personnel must sign a confidentiality agreement which extends in perpetuity beyond the final date of employment. Any dissemination of confidential information or use for personal gain or to benefit any member shall be cause for immediate dismissal. Use of office is limited to designated hours of operation.

**Summer Office Hours :**

M, W, Th 9:00 - 1:00; T & F 8:00 -Noon; Sat. 10:00 – Noon OR Determined Annually (Board will work with staff to accommodate staff & owners)

**Demonstrate the Following Competencies:**

- \_\_\_ Keyboarding - Minimum of 25 WPM
- \_\_\_ Create/format/work within Word documents (including mail labels & converting to PDF)
- \_\_\_ Work with Excel documents
- \_\_\_ Downloading, scanning, filing and printing electronic documents
- \_\_\_ Business appropriate phone etiquette
- \_\_\_ Knowledge of basic copier functions; toner replacement
- \_\_\_ Update CCOA website as directed by a Board Member
- \_\_\_ Knowledge of accessing basic account information in QuickBooks

**Duties:**

- \_\_\_ Check phone/e-mail messages & prioritize for action
  - ~ Delete all e-mail advertisements & SPAM
  - ~ Reply and, if needed, forward to the appropriate Board Member
    - \* Let the sender know whom the message was forwarded to
- \_\_\_ Answer phone calls or refer for follow-up by others
- \_\_\_ Respond to requests, answer questions, or refer them to a Board Member
- \_\_\_ Retrieve US Mail from CCOA mailbox - respond or distribute
  - ~ Notify the appropriate Board member of received mail
  - ~ Put all bills/invoices and receipts in the Genesis folder
- \_\_\_ Process and enter new & current lot owner paperwork & contact information; file when the following have been completed:
  - ~ Excel lot # worksheet: Replace old owner info with new
  - ~ Excel alphabetical worksheet: Delete old owner row; Insert row for new owner where appropriate
  - ~ Mail Labels: Replace old owner with new
    - (two sets of labels: entire membership & those with no e-mail addresses)
  - ~ Add to Gmail contacts & save to Membership group OR add to no e-mail labels if no internet
  - ~ Place contact information and **billing preference** in Genesis folder
  - ~ Be sure a copy of their deed is filed; if not, place a **red** plastic tag on the file folder & follow-up with request
  - ~ Close files and re-label to reflect most recent date
- \_\_\_ Maintain/organize files; purge old documents as directed by the Board
- \_\_\_ Make copies of various documents for office and meetings as needed
  - ~ Compile new owner packets; prepare for mailing as needed
  - ~ Keep no more than 5 copies of documents on shelves
- \_\_\_ Monitor keys to Barn for equipment use by owners
  - ~ Be sure Liability Waiver is on file with a Board signature (look in the **red** folder filed on the desk)
  - ~ Pin completed check-out sheet to bulletin board until keys are returned
- \_\_\_ Process work orders from owners' regarding problems with common elements.
- \_\_\_ Forward completed compliance issue forms to the proper Board Member

- \_\_\_ Order or pick up routine supplies for office, lodge and bathhouse cleaning/maintenance (treasurer approval)
- \_\_\_ Monitor Lodge bathrooms between cleaning days; replenish toilet paper/paper towels if needed; notify cleaning staff if a mess needs immediate attention
- \_\_\_ Other duties as assigned

Financial Duties:

- \_\_\_ Verify funds generated and turned in by the Social Committee
  - ~ Signed receipt given to committee member & copy filed in Social Committee check box
  - ~ Prepare deposit for the bank
- \_\_\_ Collect laundry money
  - ~ Remove bills from change machine & refill with quarters from the laundry
  - ~ Prepare deposit for the bank
- \_\_\_ Mail electric bills to those owners not choosing email delivery (Treasurer will bring them from Genesis)

Support Board of Managers :

- \_\_\_ Follow up with correspondence, write letters, place phone calls, etc.
- \_\_\_ Assist with preparing for General Meetings in May, July, September
- \_\_\_ Assist with Board elections by preparing mail labels, ballot envelopes, stuffing envelopes and mailing
- \_\_\_ Post certified letters and any other material related to CCOA business as requested by Board member
- \_\_\_ Send e-mail "Blasts" as requested by Board
- \_\_\_ Post Documents to CCOA Website as requested by Board (see step-by-step on office bulletin board)

Experience and Education:

- ~ Related office administration, HOA preferred.
- ~ PC computer and related applications experience
- ~ High School, GED or equivalency.
- ~ Must be bondable and provide references as requested