

# JOB DESCRIPTION

## FOR DER USE ONLY

**Vacancy No.**

City Service  
 Commission:  
 Fire & Police  
 Commission:

Finance  
 Committee:  
 Common  
 Council:

**Instructions:** Complete all sections. Refer to the *Guidelines for Preparing Job Descriptions* for instructions on completing specific items.

<b>1. Date Prepared/ Revised:</b> 11/16/2016		<b>2. Present Incumbent:</b>		<b>Is incumbent underfilling position?</b>	
<b>3. Date Filled:</b>		<b>4. Previous Incumbent:</b>		YES <input type="checkbox"/> NO <input checked="" type="checkbox"/> If YES, indicate Underfill Title in box 10.	
<b>5. Department:</b> Deferred Compensation Plan			<b>Bureau:</b> <b>Division:</b>		<b>Unit:</b> <b>Section:</b>
<b>6. Work Location:</b> City Hall, Room 404			<b>Telephone:</b> <b>Email:</b>		<b>Work Schedule:</b> Hours: 8 A.M. - 4:45 P.M. Days: Monday - Friday
<b>7. Represented by a Union?</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		<b>8. Bargaining Unit:</b> Non-Mgmt/Non-Rep If in District Council 48, which local?			<b>9. FLSA Status (check one):</b> <input type="checkbox"/> Exempt <input checked="" type="checkbox"/> Non-Exempt
<b>10. Official Title:</b> Office Assistant III				<b>Pay Range</b>	<b>Job Code</b>
				6FN	0479NR
<b>Underfill Title (if applicable):</b>					
<b>Requested Title (if applicable):</b>					
<b>Recommended Title (DER Use Only):</b>				<b>Approved by:</b>	
				<b>Date:</b>	

**11. BASIC FUNCTION OF POSITION:**

Provide day-to-day administrative assistance at the journey level for the Plan and its trustees, Executive Director and Deferred Compensation Plan Coordinator, primarily through servicing Plan members by telephone, e-mail, and correspondence, meeting scheduling, assembly of trustee meeting materials, coordination of vendor meetings, and travel, education, and expense administration.

**12. DESCRIPTION OF JOB** (Check if description applies to **Official Title**  or **Underfill Title** ):

**A. ESSENTIAL FUNCTIONS/Duties and Responsibilities:** (Refer to the "Guidelines for Preparing Job Descriptions" for instructions on determining Essential Functions.)

% of Time	ESSENTIAL FUNCTION
25	<ul style="list-style-type: none"> <li>Provide sophisticated clerical and administrative support to the Executive Director, Deferred Compensation Plan Coordinator, and the Deferred Compensation Plan Board including, but not limited to, maintaining calendars, receiving and screening visitors, telephone calls, correspondence, and e-mails, routing and handling all mail and correspondence, and composing routine correspondence.</li> </ul>
25	<ul style="list-style-type: none"> <li>Coordinate all administrative aspects of regular and special Board, Executive Finance Committee, and other committee meetings; schedule and arrange for meetings, prepare, publish and post agendas and meeting notices and compile and distribute all related materials. Attend meetings and prepare meeting minutes; follow up on projects and assemble and distribute Board and Committee meeting packets.</li> </ul>
10	<ul style="list-style-type: none"> <li>Ensure operation of required office equipment by completing preventative maintenance requirements, troubleshooting malfunctions, calling for repairs, and maintaining equipment inventories. Order supplies and evaluate new equipment needs. Prepare requisitions and create vouchers for office supplies, equipment, and services within the City's Financial Management Information System (FMIS).</li> </ul>
10	<ul style="list-style-type: none"> <li>Manage department and Plan records by organizing and maintaining the filing system for all correspondence, contracts and plan documentation, including, but limited to, participant files from the Third Party Administrator. Create and maintain record retention schedules and procedures. Provide historical reference by developing and utilizing filing, record retention, and database systems when a request is made by the Executive Director, Board members, participants or outside agencies.</li> </ul>
10	<ul style="list-style-type: none"> <li>Assist with circulating Request for Proposals. Responsible for circulation and final execution of all service provider contracts.</li> </ul>
10	<ul style="list-style-type: none"> <li>Assist with scheduling and planning of participant education sessions.</li> </ul>
5	<ul style="list-style-type: none"> <li>Prepare all travel planning and expense submissions for the Executive Director and Deferred Compensation Plan Coordinator, as well as all expense submissions related to continuing education for the Executive Director and Deferred Compensation Plan Coordinator.</li> </ul>

The above statements are intended to summarize the nature and level of work and typical responsibilities and duties being performed by the incumbent(s) of this job. They are not intended to be an exhaustive list of all responsibilities, duties, and tasks required of the position.

**B. PERIPHERAL DUTIES:**

% of Time	PERIPHERAL DUTY
5	<ul style="list-style-type: none"> <li>Attend retiree association and other employee or retiree meetings to assist the Executive Director and Deferred Compensation Plan Coordinator as needed.</li> </ul>

**C. NAME AND TITLE OF IMMEDIATE SUPERVISOR:**

Elaine Bieszk, Deferred Compensation Plan Coordinator, and Margaret Daun, Executive Director

**D. SUPERVISION RECEIVED:** (Describe the extent to which work assignments and methods are outlined, reviewed, and approved by this position's supervisor.)

The Deferred Compensation Plan Coordinator is responsible for day-to-day supervision, including assigning tasks and providing performance feedback. Hiring, firing, and compensation decisions shall be made by the Executive Director.

**E. SUPERVISION EXERCISED:**

Total number of employees for whom responsible, either directly or indirectly = 0.

**Direct Supervision:** List the number and titles of personnel directly supervised. Specify the kind and extent of supervision exercised by indicating one or more of the following:

a. Assign duties	e. Sign or approve work
b. Outline methods	f. Make hiring recommendations
c. Direct work in progress	g. Prepare performance appraisals
d. Check or inspect completed work	h. Take disciplinary action or effectively recommend such
<b>Number Supervised</b>	<b>Job Title</b>
<b>Extent of Supervision Exercised</b> (Select those that apply from list above, a - h)	

**F. MINIMUM QUALIFICATIONS REQUIRED:** (Indicate the MINIMUM qualifications required to enter the job.)

i. Education and Experience:

Four or more years of office support experience performing duties requiring the exercising of independent judgment and interactions with a diverse set of stakeholders and customers, as well as the handling of confidential materials. Equivalent combinations of education and experience may also be considered. Part-time experience that totals four or more years may also be considered.

ii. Knowledge, Skills and Abilities:

- o Knowledge of and proficient in all office operations.
- o Ability to maintain records and complex files.
- o Demonstrated complex project management skills with the ability to meet deadlines on time.
- o Proficiency in all Microsoft Office programs (Word, Excel, PowerPoint, and Outlook) and Adobe Acrobat, as well as office equipment (printers, fax machines, copiers, etc.).
- o An understanding of parliamentary procedures per Robert's Rules of Order and general board operations is highly desirable.
- o Ability to transcribe Board and committee minutes and draft recommended abbreviated minutes. Proficient in English grammar, writing mechanics, and vocabulary.
- o Ability to prepare memorandums and e-mail messages and to enter data accurately.
- o Ability to take direction orally and in writing from various sources (i.e., vendors, trustees, the Executive Director and Deferred Compensation Plan Coordinator). Proficient in interactions with a wide variety of Plan stakeholders.
- o Demonstrated customer service skills both in writing and on the telephone.
- o Ability to maintain confidentiality.

iii. Certifications, Licenses, Registrations:

None.

iv. Other Requirements:

None.

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### 13. PHYSICAL AND ENVIRONMENTAL DEMANDS: TOOLS AND EQUIPMENT USED

The Americans with Disabilities Act (ADA) of 1990, as amended by the Americans with Disabilities Act Amendments Act (ADAAA) of 2008 requires job descriptions to provide detailed information regarding the physical demands required to perform the essential functions of a job; the conditions under which the job is performed; and the tools and equipment the employee will be required to use on the job. Reasonable accommodations may be made to enable qualified individuals to perform the essential duties and responsibilities of the job for each of the categories listed below.

**G. PHYSICAL ACTIVITY OF THE POSITION:** (List the physical activities that are representative of those that must be met to successfully perform the essential functions of the job).

**CHECK ALL THAT APPLY:**

<input type="checkbox"/>	<b>Climbing:</b> Ascending or descending ladders, stairs, scaffolding, ramps, poles, and the like; using feet and legs and/or hands and arms. Body agility is emphasized. Check only if the amount and kind of climbing required exceeds that required for ordinary locomotion.
<input type="checkbox"/>	<b>Balancing:</b> Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. Check only if the amount and kind of balancing exceeds that needed for ordinary locomotion and maintenance of body equilibrium.
<input type="checkbox"/>	<b>Stooping:</b> Bending body downward and forward by bending spine at the waist. Check only if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.
<input type="checkbox"/>	<b>Kneeling:</b> Bending legs at knee to come to a rest on knee or knees.
<input type="checkbox"/>	<b>Crouching:</b> Bending the body downward and forward by bending leg and spine.
<input type="checkbox"/>	<b>Crawling:</b> Moving about on hands and knees or hands and feet.
<input type="checkbox"/>	<b>Reaching:</b> Extending Hand(s) and arm(s) in any direction.
<input type="checkbox"/>	<b>Standing:</b> Particularly for sustained periods of time.
<input type="checkbox"/>	<b>Walking:</b> Moving about on foot to accomplish tasks, particularly for long distances.
<input type="checkbox"/>	<b>Pushing:</b> Using upper extremities to exert force in order to draw, press against something with steady force in order to thrust forward, downward or outward.
<input type="checkbox"/>	<b>Pulling:</b> Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.
<input type="checkbox"/>	<b>Lifting:</b> Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. Check only if it occurs to a considerable degree and requires substantial use of the upper extremities and back muscles.
<input type="checkbox"/>	<b>Fingering:</b> Picking, pinching, typing or otherwise working primarily with fingers rather than with the whole hand or arm, as in handling.
<input type="checkbox"/>	<b>Grasping:</b> Applying pressure to an object with fingers and palm.
<input type="checkbox"/>	<b>Feeling:</b> Perceiving attributes of objects such as size, shape, temperature or texture by touching with the skin, particularly that of the fingertips.
<input checked="" type="checkbox"/>	<b>Talking:</b> Expressing or exchanging ideas by means of the spoken word. Those activities which demand detailed or important instructions spoken to other workers accurately, loudly or quickly.
<input checked="" type="checkbox"/>	<b>Hearing:</b> Perceiving the nature of sounds with no less than a 40 db loss. Ability to receive oral communication and make fine discriminations in sound.
<input checked="" type="checkbox"/>	<b>Repetitive Motions:</b> Substantial movements (motions) of the wrist, hands, and/or fingers.
<input type="checkbox"/>	<b>Driving:</b> Minimum standards required by State Law (including license).

**H. PHYSICAL REQUIREMENTS OF THE POSITION:** (List the physical requirements that are essential functions of the job.)

**CHECK ONE:**

<input type="checkbox"/>	<b>Sedentary Work:</b> Exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
<input checked="" type="checkbox"/>	<b>Light Work:</b> Exerting up to 10 pounds of force occasionally and/or negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for sedentary work and the worker sits most of the time, the job is rated for Light Work.
<input type="checkbox"/>	<b>Medium Work:</b> Exerting up to 50 pounds of force occasionally and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
<input type="checkbox"/>	<b>Heavy Work:</b> Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
<input type="checkbox"/>	<b>Very Heavy Work:</b> Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

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**I. VISUAL ACUITY REQUIREMENTS:** (List the visual acuity requirements that are essential functions of the job.)

**CHECK ONE:**

<input checked="" type="checkbox"/>	<b>Operators (Electronic Equipment), Inspection, Close Assembly, Clerical, Administrative:</b> This is a minimum standard for use with those whose job requires work done at close visual range (i.e. preparing and analyzing data and figures, accounting, transcription, computer terminal, extensive reading, visual inspection involving small parts, operation of machines, using measurement devices, assembly or fabrication of parts).
<input type="checkbox"/>	<b>Machine Operators, Mechanics, Skilled Tradespeople:</b> This is a minimum standard for use with those whose work deals with machines where the seeing job is at or within arm's reach. This also includes mechanics and skilled tradespeople and those who do work of a non-repetitive nature such as carpenters, technicians, service people, plumbers, painters, mechanics, etc. (If the machine operator also inspects, check the "Operators" box.)
<input type="checkbox"/>	<b>Mobile Equipment Operators:</b> This is a minimum standard for use with those who operate cars, trucks, forklifts, cranes, and high lift equipment.
<input type="checkbox"/>	<b>Other:</b> This is a minimum standard based on the criteria of accuracy and neatness of work for janitors, sweepers, etc.

**J. THE CONDITIONS THE WORKER WILL BE SUBJECT TO IN THIS POSITION:**

List the environmental/working conditions to which the employee may be exposed while performing the essential functions of the job. Include scheduling considerations such as on-call for emergencies, rotating shift, etc. **Approximate Percentage of time performing field work: 0%**

**CHECK ALL THAT APPLY:**

<input checked="" type="checkbox"/>	<b>None:</b> The worker is not substantially exposed to adverse environmental conditions (such as typical office or administrative work).
<input type="checkbox"/>	<b>The worker is subject to inside environmental conditions:</b> Protection from weather conditions but not necessarily from temperature changes (i.e. warehouses, covered loading docks, garages, etc.)
<input type="checkbox"/>	<b>The worker is subject to outside environmental conditions:</b> No effective protection from weather.
<input type="checkbox"/>	<b>The worker is subject to extreme cold:</b> Temperatures below 32 degrees for period of more than one hour.
<input type="checkbox"/>	<b>The worker is subject to extreme heat:</b> Temperatures above 100 degrees for periods of more than one hour.
<input type="checkbox"/>	<b>The worker is subject to noise:</b> There is sufficient noise to cause the worker to shout in order to be heard above the surrounding noise level.
<input type="checkbox"/>	<b>The worker is subject to vibration:</b> Exposure to oscillating movements of the extremities or whole body.
<input type="checkbox"/>	<b>The worker is subject to hazards:</b> Includes a variety of physical conditions, such as proximity to moving mechanical parts, electrical current, working on scaffolding and high places or exposure to chemicals.
<input type="checkbox"/>	<b>The worker is subject to atmospheric conditions:</b> One or more of the following conditions that affect the respiratory system or the skin: Fumes, odors, dust, mists, gases or poor ventilation.
<input type="checkbox"/>	<b>The worker is subject to oil:</b> There is air and/or skin exposure to oils and other cutting fluids.
<input type="checkbox"/>	<b>The worker is required to wear a respirator.</b>

**K. MACHINE, TOOLS, EQUIPMENT, ELECTRONIC DEVICES, SOFTWARE, ETC. USED BY POSITION:**

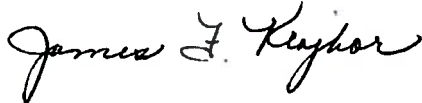
List equipment needed to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.)

**CHECK ALL THAT APPLY:**

<input type="checkbox"/>	Camera and photographic equipment	<input checked="" type="checkbox"/>	Office Equipment (desk, chair, telephone, etc.)						
<input type="checkbox"/>	Cleaning supplies	<input checked="" type="checkbox"/>	Office supplies (pens, staplers, pencils, etc.)						
<input type="checkbox"/>	Commercial vehicle	<input checked="" type="checkbox"/>	Packing materials (boxes, shrink wrap, etc.)						
<input checked="" type="checkbox"/>	Data processing equipment	<input checked="" type="checkbox"/>	PC equipment (monitor, keyboard, printer, etc.)						
<input checked="" type="checkbox"/>	Handcart	<input checked="" type="checkbox"/>	PC software						
<input type="checkbox"/>	Hand tools (please list):								
<input checked="" type="checkbox"/>	Office Machines (check all that apply):	<input checked="" type="checkbox"/>	Copier	<input checked="" type="checkbox"/>	Facsimile	<input checked="" type="checkbox"/>	Calculator	<input type="checkbox"/>	Cash register
<input type="checkbox"/>	Other (please list):								

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- L. **SUPPLEMENTARY INFORMATION:** (Indicate any other information which further explains the importance, difficulty, or uniqueness of the position, such as its scope of responsibility related to finances, equipment, people, information, etc. Also indicate success factors such a personal characteristics that contribute to an individual's ability to perform well in the job, and any other special considerations.)
- M. **I believe that the statements made above in describing this job are complete and accurate.**



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Board Vice Chair  
*Signature of Department Head or Designated Representative*

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