



Town of Southwest Ranches Job Description

Title: **Records and Administrative Coordinator**
Department: Town Clerk/Finance & Budget Office
FLSA Status: Exempt
Reports to: Town Clerk

General Description:

This is specialized administrative professional work in the management and preservation of Town records. Work primarily involves receipt, storage, retention, retrieval and disposition of permanent, temporary, and vital records, microfiche, and microfilm. Work requires the use of initiative and judgment in cooperating with various offices, divisions, and departments to provide a timely flow of records management and retention needs as well as report compilation/distribution and monitoring. Work is reviewed for compliance with records management guidelines, conformity with departmental policy and the efficiency of operation. Performs related work as assigned. Position will report to Town Clerk but will be assigned tasks that assist Finance and Budget Office.

Essential Functions:

1. Assists the Town Clerk in planning, organizing and supervision of the daily maintenance of the Town records.
2. Receives, researches and responds to records requests.
3. Answers and screens telephone calls in a professional and timely manner; takes accurate messages with a high degree of professionalism and courtesy; arranges conference calls.
4. Distributes daily internal/external mail and overnight packages; sends and distributes faxes.
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6. Assists in maintaining Finance & Budget department recordkeeping including scanning, filing and disposal of Accounts Payable, Cash Receipts, Journal Entries and Procurement.
7. Assists in the administrative functions involving the annual compilation and distribution of the Towns comprehensive annual financial report as well as proposed/adopted budgets.
8. Assists in Procurement and Risk Management duties/functions, tracking and monitoring including vendor compliance as coordinated by the Town Clerk.
9. Assists in the preparation of daily cash receipt process.
10. Maintains a computerized database of information on records retained and destroyed.
11. Composes, types, and distributes professional correspondence and memoranda, E-mails, and faxes, using individual initiative and as assigned.
12. Maintains records retention and disposal schedules in compliance with records management guidelines.



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13. Performs work attendant to sorting, coding, storing, and retrieving records; compiles information and prepares reports.
14. Assists in the coordination of educational record keeping seminars for all Town departments.
15. Receives and checks records in storage boxes against transfer lists to insure completeness.
16. Notifies supervisor of missing records; notes transfers, lists the numerical location of each document.
17. Places containers in correct shelf space using ladders and lifts; moves containers between shelves and re-marks them as required.
18. Retrieves documents or folders from storage in response to requests from the departments.
19. Re-files documents returned from the departments in correct containers and filing positions by referring to check-out form; corrects misfiled documents.
20. Assists supervisor in the systematic destruction of records in accordance with authorized retention schedules.
21. Performs routine filing, record keeping and may operate simple office equipment.
22. Coordinates special projects as determined by the Town Clerk & Town Financial Administrator.
23. Operates a variety of equipment such as a computer, printer, typewriter, fax machine, calculator, copier, telephone, etc.
24. Interacts and communicates with the Town Clerk & Town Financial Administrator, other departmental supervisors and employees, co-workers, other government agencies and external organizations, and the general public.
25. Performs other duties as assigned or required by the Town Clerk or Town Financial Administrator.

Minimum Qualifications:

A. Education and Experience:

GED or a graduation from high school, (Associate of Arts or Science degree in business or public administration is strongly preferred), supplemented by three (3) years' experience in records storage methods or records management clerical work, or any equivalent combination of relevant training and experience.

Driver License

Valid Florida Class E or higher Driver License with clean driving record.

B. Advisory Board Liaison:

None

C. Certifications:

- Ability to obtain Certified Records Analyst or Certified Records Manager (CRA/CRM) professional designation within three (3) years.



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- Notary Public
- ICS certifications in accordance with current NIMS requirements. Must obtain ICS certifications within two (2) years of the date of hire.

D. Knowledge, Skills and Abilities:

- Must possess excellent oral and written communication skills.
- Excellent interpersonal skills required, customer service experience a plus.
- Must have knowledge of standard office practices, procedures, equipment, and office assistance techniques. Must have working knowledge of Microsoft software including Word, Excel, PowerPoint, and databases. Familiarity with Microsoft Office Suite.
- Ability to serve the public and fellow employees with honesty and integrity in accordance with the Town's Ethics and Conflict of Interest policies.
- Establish and maintain effective working relationships with the general public, coworkers, elected and appointed officials and members of diverse cultural and linguistic backgrounds regardless of race, color, religion, age, gender, ethnicity, disability, sexual orientation, marital status, or political affiliation.
- Excellent verbal and written communication skills.
- Exceptional Time Management and ability to meet deadlines.
- Strong organizational skills and ability to multitask.
- Problem-solving and decision-making skills
- Ability to work effectively with minimal supervision
- Strong interpersonal and customer service skills
- Ability to treat confidential information with appropriate discretion.
- Exceptional attention to detail.
- Skilled in the use of standard office equipment (e.g., copiers, business telephone systems, projectors, etc.).

Essential Physical Skills:

Acceptable eyesight, hearing (with/without correction), ability to communicate (orally and in writing), reaching, pulling, pushing, walking, standing, sitting, kneeling, and bending. Must be able to carry up to 25 pounds.

Ability to safely drive Town vehicle to and from storage unit to deliver and retrieve Town records.

Environmental Conditions:

Works primarily in an office environment.

Key Competencies:

Integrity, Initiative, Judgment, Attention to Detail, Interpersonal skills, Communication (oral and written). Work is performed under general supervision and is reviewed through reports, periodic internal and external audits, conferences, and an annual performance appraisal review.



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(Reasonable accommodations will be made for otherwise qualified individuals with a disability.)

Employee Job Description Acknowledgment and Receipt

I acknowledge that I have received the Job Description to which I am assigned to for employment with the Town of Southwest Ranches.

Employee's Signature

Employee's Name (Print)

Date