

TOWN OF SHREWSBURY Position Description

Position Title: **Administrative Assistant**

Department: Retirement Board

Reports To: Executive Director

Date: February 2024

GENERAL SUMMARY:

Under the general supervision of the Executive Director and in accordance with the applicable provisions of the Massachusetts General Laws, performs skilled administrative, bookkeeping and customer service work supporting the operations of the Shrewsbury Contributory Retirement System.

Performs varied and responsible duties requiring a thorough knowledge of departmental operations and the exercise of some judgment and initiative; receives instructions relative to changes in priority and in situations not clearly defined by precedent or established procedures.

ESSENTIAL JOB FUNCTIONS*:

Essential Job Functions are not intended to be an exhaustive list of all responsibilities, duties and skills. They are intended to be accurate summaries of what the job classification involves and what is required to perform effectively. The position is responsible for all other duties as assigned.

- ◆ Post Member Deductions into Retirement Database (PTG-Pension Technology Group).
- ◆ Assist Members and Retirees with any inquiries or questions they have regarding their account. Inquiries may be in person, via telephone or email; Provide forms, account updates, paperwork, or other documents needed by members or retirees; Refer members or retirees to another department as needed for their inquiry.
- ◆ Process requests from other retirement systems concerning service time buybacks by researching archives for Refund/Rollover documents, payroll documents, work with other departments as needed to assist (Accounting and/or School Depts.); Contact outside retirement systems to obtain information to process member Transfers/Buybacks ; Process Buybacks when information is returned; contact member to initiate Buyback process
- ◆ Process and track yearly retiree Affidavits follow-up on overdue Affidavits
- ◆ Filing and file maintenance; pull files for members that have transferred or rolled-over their accounts and deceased retiree files for archiving; Review inactive member files and attempt to contact them concerning their account
- ◆ Prepare and post monthly meeting notices, prepare and distribute monthly board agenda, Take and transcribe meeting minutes, Maintain and update all Board policies with PERAC, compute payments for retirement system operating expenses.

- ◆ Ability and willingness to attend classes and seminars relating to job functions, etc.
- ◆ Performs other related duties as required, directed or as the situation dictates.

EDUCATION & EXPERIENCE:

- ◆ High school graduation, minimum of one to three (1-3) years of related office experience with a basic understanding of municipal retirement systems, or an equivalent combination of education and experience.

KNOWLEDGE, SKILLS & ABILITIES:

- ◆ Knowledge of the principles and practices of Retirement Systems preferred. Knowledge of technology including the application of office software.
- ◆ Ability to communicate effectively in written and oral form. Ability to multi-task and plan work to meet deadlines. Perform multiple tasks, attention to detail and perform work with accuracy, work independently and be self-motivated.
- ◆ Skill in computers and appropriate software applications. Aptitude for numbers and details. Excellent analytical, spreadsheet and database skills. Excellent organizational, planning, and analytical skills. Effective customer service skills; proficient written and oral communication skills.

WORKING CONDITIONS & PHYSICAL DEMANDS:

Work is performed under typical office conditions; the work environment is moderately quiet with frequent interruptions. Work is subject to predicted seasonal fluctuations. The employee operates standard office equipment, including computer, telephone, copier, and fax machine. The employee has frequent contact with other town departments and vendors, and limited contact with the general public. Communication is by telephone, e-mail and in person. The employee has access to personnel files and bid documents. Most errors are easily detected and corrected, but could result in delay or loss of service, monetary loss and legal repercussions.

Minimal physical effort is generally required to perform duties. The employee is frequently required to stand, walk, sit, speak and hear, and use hands to operate equipment. Vision requirements include the ability to read routine documents, and use a computer.

The above statements are intended to describe the general nature and level of work being performed by people assigned to do this job. The above is not intended to be an exhaustive list of all responsibilities and duties required. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.

***External and internal applicants, as well as position incumbents who become disabled as defined under the Americans With Disabilities Act, must be able to perform the essential job functions (as listed) either unaided or with the assistance of a reasonable accommodation to be determined by management on a case by case basis.**

This job description does not constitute an employment agreement between the employer and employee, and is subject to change by the employer, as the needs of the employer and requirements of the job change.