



January 8, 2018

TO: LOCSO Board of Directors

FROM: Renee Osborne, General Manager

SUBJECT: Agenda Item 11G – 1/18/2018 Board Meeting
Adopt Resolution Amending the Personnel Policy to Create the Position of Utility Billing Specialist, Revise the Job Description for the Administrative Clerk I/II/III Position; and Amend the Organization Chart

President
Jon-Erik G. Storm

Vice President
Vicki L. Milledge

Directors
Charles L. Cesena
Marshall E. Ochyalski
Louis G. Tornatzky

General Manager
Renee Osborne

District Accountant
Robert Stilts, CPA

Unit Chief
Scott M. Jalbert

Battalion Chief
Greg Alex

RECOMMENDATION

By resolution, amend the Personnel Policy to include the position of Utility Billing Specialist and revise the job description for the Administrative Clerk I/II/III position.

STAFF RECOMMENDATION

This item will be approved along with the Consent Calendar unless it is pulled by a Director for separate consideration. If so, Staff recommends that the Board adopt the following motion:

Motion: I move that the Board adopt Resolution 2018-01 amending the District's Personnel Policy to create the position of Utility Billing Specialist; revise the job description for the position of Administrative Clerk and initial series salary range; and, amend the Organization Chart to reflect the changes.

DISCUSSION

The Administrative/Accounting Assistant III position, currently held by Liz Radvansky, does not accurately reflect the duties that she has been assigned since 2014. Creating the Utility Billing Specialist position and moving her from the Administrative Department to Utilities Department accurately reflects her responsibilities as she has little to no administrative assignments and has been paid from Fund 500 all along.

At this time, the Administrative/Accounting series no longer reflects the needs of the District. Staff is requesting that the Administrative Clerk series be revised and a full-time Administrative Clerk I be hired to perform a wide variety of duties including receptionist, customer service, and much needed backup support in both Administrative and Utilities Departments.

Since District employees are represented by the San Luis Obispo County Employees Association (SLOCEA), District staff discussed the proposed changes, received and incorporated input from SLOCEA Senior Representative Theresa Schultz, and have met the District's meet and confer obligations.

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FINANCIAL IMPACT

Amending the Personnel Policy to create the Utility Billing Specialist will have no impact on the District's finances as there is no change in salary and benefits. The Administrative Clerk position will impact the Administration fund by approximately \$2,250, since half of the salary will come out of the 100 Fund. This addition to the budget is reflected in the Mid-Year adjustments. This position will not affect the Water Fund, since we are removing a current full time position from that Fund.

Attachments

RESOLUTION NO. 2018-01

**A RESOLUTION OF THE BOARD OF DIRECTORS
OF THE LOS OSOS COMMUNITY SERVICES DISTRICT
AMENDING THE PERSONNEL POLICY TO CREATE THE POSITION OF
UTILITY BILLING SPECIALIST, REVISE THE JOB DESCRIPTION FOR THE ADMINISTRATIVE CLERK POSITION
AND SET THE INITIAL SALARY RANGE, AND AMEND THE ORGANIZATION CHART**

WHEREAS, the Board desires to provide for prudent management of the LOCSD's Personnel Resources; and

WHEREAS, the Board reviewed the proposed amendments to the District Personnel Policy to create positions necessary to the proper and efficient operations of the District attached herein to the Personnel Policy at a public meeting;

NOW, THEREFORE, THE BOARD OF DIRECTORS OF THE LOS OSOS COMMUNITY SERVICES DISTRICT DOES HEREBY RESOLVE, DECLARE, DETERMINE AND ORDER AS FOLLOWS:

1. The Organization Chart shall be amended in the Personnel Policy to delete the Admin/Accounting Assistant Part-Time position and the Utility Compliance Technician position as detailed in the attached chart.
2. The Personnel Policy is hereby amended to add a new section 7240, Utility Billing Specialist, as detailed in the attached Job Description, incorporated by reference herein.
3. The Personnel Policy is hereby amended to add a new section 7040, Administrative Clerk I/II/III, as detailed in the attached Job Description, incorporated by reference herein.
4. The FY17/18 Salary Range for these two positions is established as detailed in the attached Wage Scale, incorporated by reference herein.
5. That the General Manager is authorized to fill these positions.

On the motion of Director _____, seconded by Director _____, and on the following roll call vote, to wit:

Ayes: _____

Nays: _____

Absent: _____

Conflicts: _____

The foregoing resolution is hereby passed, approved, and adopted by the Board of Directors of the Los Osos Community Services District this 18th day of January 2018.

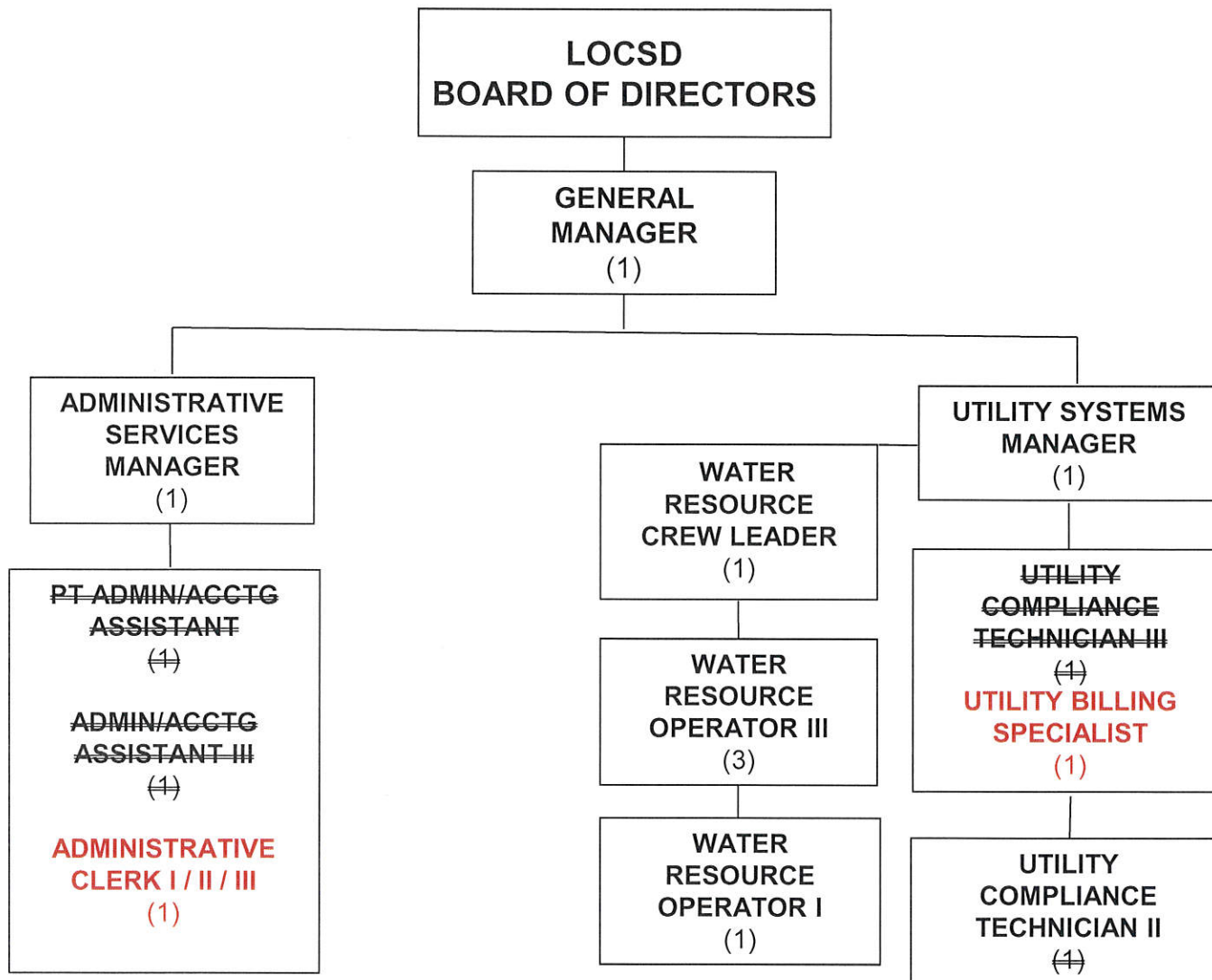
President, Board of Directors
Los Osos Community Services District

ATTEST:

APPROVED AS TO FORM:

Renee Osborne
General Manager and Secretary to the Board

Roy A. Hanley
District Legal Counsel



Proposed Administrative and Utilities Department Organizational Chart

1. DEFINITION:

Under the supervision of the Administrative Services Manager, performs a wide variety of general clerical duties including: reception; public information; customer service; receive water bill payments, activation fees, and other fees for the District; word processing; filing; copying; operation of automated office equipment including personal computers, facsimile, electronic copiers, printers, calculators, etc., and other related work as required.

2. TYPICAL TASKS:

- Answer multi-line phone
- Assist the public in person and on the telephone, or direct inquiries to staff qualified to provide answers
- Provide information and assistance to customers regarding their water accounts; receive payments; issue receipts
- Provide information and assistance to office and field personnel regarding customer accounts
- Receive and process all incoming mail
- Monitor fax machine and distribute incoming faxes
- Prepare correspondence and/or documents from rough draft or copies
- Filing, copy work, and proofreading, as needed
- Assist in preparation of Accounts Payable vouchers and blanket Purchase Orders
- Maintenance of reception, conference and common areas
- Maintain the District website
- Maintain the District Community Calendar on Channel 20
- Handle money, count back change accurately, perform basic math calculations
- Balance the cash drawer for the cash water payments received , provide the Utility Billing Specialist with cash payments and receipts record of same to be credited to customer accounts
- Provide backup in producing utility billing in the absence of the Utility Billing Specialist
- Provide backup at Board of Director and Advisory Committee meetings, taking and transcribing minutes in the absence of the Administrative Services Manager
- Provide assistance to the Administrative Services Manager in producing and publishing Board of Director and Advisory Committee meeting agendas and meeting packets

3. EMPLOYMENT STANDARDS:

Knowledge of:

- Appropriate procedures, practices, rules, and policies governing office methods including good customer service practices
- Office computer equipment and software including but not limited to Microsoft Office Suites (MS Outlook, MS Word, MS Excel, MS PowerPoint, and MS Access)

Ability to:

- Follow general directions
- Perform responsible reception, clerical, bookkeeping and secretarial duties
- Compose correspondence independently or form general directions
- Proficiently operate a 10-key adding machine
- Perform basic math calculations and make change accurately
- Prepare basic Excel spreadsheets
- Work independently, prioritize work and make decisions regarding correct formatting of work and implementation of same
- Meet and deal with the public and co-workers tactfully and courteously
- Maintain a cooperative relationship with those contacted in the course of work

4. EDUCATION/EXPERIENCE

Any combination of education and experience equivalent to graduation from high school; two (2) years of increasingly responsible clerical and secretarial experience

5. LICENSES/CERTIFICATES

Must possess and maintain a valid, unrestricted California driver's license

7240 – UTILITY BILLING SPECIALIST

1. DEFINITION

Under the direction of the Utility Systems Manager, the Utility Billing Specialist is responsible for overseeing all utility billing and meter reading functions, as well as playing a key customer service role, including dealing with difficult customer inquiries and problems. The position will also coordinate closely with front desk personnel and field staff in the execution of duties.

Other responsibilities include: ensuring the integrity of the District's billing and meter reading systems and processes, including maintaining accurate billing, payment and customer accounting records; identifying and troubleshooting problematic meters; managing service requests; and developing analyses and reporting for District staff. May attend and participate with other agencies and representatives in public outreach programs for water conservation, storm water pollution prevention, and drainage. Performs other related work as required.

2. AREA OF RESPONSIBILITY

- Prepares bi-monthly utility bills and other related bills and notices including final bills, past due notices, 48-hour shut-off warning notices, and shut-offs ensuring that billings are accurate and are processed expeditiously. Processes new or cancelled accounts, meter changes, or other similar utility billing activities as required.
- Receives and responds to staff and customer queries on billings, meter readings, and other customer service issues. Researches, interprets, and analyzes account history to resolve billing questions on meter readings. Handles customer questions and/or complaints in an efficient and friendly manner. Resolves problems requiring immediate attention, and verifies that underlying systematic or process issues have been addressed.
- Prepares month-end closing and reporting; adjustment entries; and account reconciliations as required.
- Creates and reviews audit reports to troubleshoot and resolve billing or meter reading issues.
- Oversees meter reading process and prepares handhelds and other devices for meter reading process. Closely interacts with the field/meter reading crew to ensure that meters are read and reported back on a timely basis, and issues are investigated and resolved.
- Manages service request process, ensuring all service requests, (including meter re-reads, "on and offs", etc.) are being handled expeditiously by field crews and are properly recorded in the District's system.

- Serves as the District's expert for meter reading systems, devices, and software; ensuring that the District is maximizing the features of the devices/systems.
- Prepares and processes purchase orders, payment vouchers, invoices, and reimbursement claims.
- Assists Utility Systems Manager in preparation of annual budget.
- Coordinates and responds to customer service related matters in regard to the water, drainage, and other utility related areas as assigned by the Utilities System Manager.

3. DISTINGUISHING CHARACTERISTICS

The Utility Billing Specialist will have a **solid** understanding of generally accepted accounting principles as well as internal controls, and have demonstrated experience in an accounting, billing or other comparable role where accuracy is critical.

The position will be held accountable for accurate and timely billing and meter reading and must also be able to act independently and proactively in order to identify and troubleshoot problems and bring issues forward to District staff. The Utility Billing Specialist must also possess strong systems, analysis, and report writing skills.

4. EMPLOYMENT STANDARDS

Knowledge of:

- Appropriate procedures, practices, rules, and policies governing office methods including good customer service practices.
- Office computer equipment and software including but not limited to Microsoft Office Suites (MS Outlook, MS Word, MS Excel, MS PowerPoint, and MS Access).
- Techniques of business letter and report writing.
- Effective public relation and communication skills.

Ability to:

- Understand and work effectively with the utility billing software system.
- Evaluate customer problems/concerns and exercise independent judgement to resolve them
- Negotiate with customers with the scope of responsibility.
- Coordinate closely with District field staff in managing customer service cross-functional tasks in order to accommodate scheduling and to maximize staff efficiency.
- Perform a wide range of customer service functions with speed and accuracy and apply good judgement in recognizing scope of authority.
- Perform analyses/audits of data to ensure accuracy of report and billing.

- Identify, analyze and troubleshoot issues, and highlight issues to Utility Systems Manager.
- Interpret and apply policies, procedures, standards and requirements related to assigned responsibilities.
- Plan, organize, coordinate, and prioritize assigned tasks to meet deadlines successfully.

5. EXPERIENCE

- Three plus (3+) years of experience in a billing/accounts receivable/customer service environment (or comparable experience) and demonstrating increasing responsibility.
- Proficient in an enterprise accounting/utility billing system; strong Microsoft Office skills.
- Excellent verbal skills and report writing skills.
- Experience in a public utility/agency in a customer service role is a plus.
- Meter reading exposure is also desirable.

6. LICENSES/CERTIFICATES

Must possess and maintain a valid, unrestricted California driver's license.

LOCSD Miscellaneous Employee Bargaining Unit
 Step By Step -wages effective July 1, 2017 - PEPRA

POSITION	Step 1	Step 2	Step 3	Step 4	Step 5
Admin /Accounting Assistant Trainee	13.12 27,289.29	13.78 28,669.68	14.50 30,156.26	15.26 31,749.02	16.13 33,554.14
Administrative Clerk I	16.94 35,235.20	17.79 37,003.20	18.68 38,854.40	19.61 40,788.80	20.59 42,827.20
Administrative Clerk II	21.62 44,969.60	22.70 47,216.00	23.84 49,587.20	25.03 52,062.40	26.28 54,662.40
Administrative Clerk III	27.59 57,387.20	28.96 60,236.80	30.40 63,232.00	31.92 66,393.60	33.52 69,721.60
Administrative Service Manager	35.00 72,800.00	37.52 78,045.24	39.40 81,952.81	41.37 86,051.51	43.43 90,341.35
Utility Billing Specialist	27.98 58,188.83	29.40 61,161.98	30.83 64,135.14	32.37 67,320.66	34.00 70,718.54
Utility Complinance Technician I	21.03 43,747.81	22.05 45,871.49	23.18 48,207.54	24.35 50,649.77	25.53 53,092.00
Utility Complinance Technician II	26.19 54,472.39	27.46 57,126.99	28.84 59,993.96	30.27 62,967.11	31.80 66,152.63
Utility Complinance Technician III	32.62 67,851.58	34.25 71,249.46	35.94 74,753.54	37.78 78,576.16	39.61 82,398.78
Water Resource Operator Trainee	16.03 33,341.78	16.90 35,146.90	17.71 36,845.85	18.58 38,650.98	19.55 40,668.47
Water Resource Operator I	18.58 38,650.98	19.55 40,668.47	20.57 42,792.15	21.65 45,022.02	22.67 47,145.70
Water Resource Operator II	20.73 43,110.70	21.80 45,340.57	22.87 47,570.43	23.99 49,906.48	25.22 52,454.90
Water Resource Operator III	23.99 49,906.48	25.22 52,454.90	26.39 54,897.13	27.72 57,657.91	29.15 60,631.06
Water Resource Operator IV	29.15 60,631.06	30.63 63,710.40	32.21 67,002.10	33.90 70,506.18	35.58 74,010.25
Water Resource Crew Leader	32.83 68,276.31	34.46 71,674.20	36.25 75,390.64	38.08 79,213.26	40.02 83,248.26