



PALMDALE WATER DISTRICT

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February 26, 2015

*Agenda for a Meeting
of the Personnel Committee of the Palmdale Water District
Committee Members: Kathy Mac Laren-Chair, Joe Estes
to be held at the District's office at 2029 East Avenue Q, Palmdale
Monday, March 2, 2015
5:00 p. m.*

NOTE: To comply with the Americans with Disabilities Act, to participate in any Board meeting please contact Dawn Deans at 661-947-4111 x1003 at least 48 hours prior to a Board meeting to inform us of your needs and to determine if accommodation is feasible.

Agenda item materials, as well as materials related to agenda items submitted after distribution of the agenda packets, are available for public review at the District's office located at 2029 East Avenue Q, Palmdale (Government Code Section 54957.5).
. Please call Dawn Deans at 661-947-4111 x1003 for public review of materials.

PUBLIC COMMENT GUIDELINES: The prescribed time limit per speaker is three- minutes. Please refrain from public displays or outbursts such as unsolicited applause, comments, or cheering. Any disruptive activities that substantially interfere with the ability of the District to carry out its meeting will not be permitted and offenders will be requested to leave the meeting.

Each item on the agenda shall be deemed to include any appropriate motion, resolution, or ordinance to take action on any item.

- 1) Roll call.
- 2) Adoption of agenda.
- 3) Public comments.
- 4) Action Items: (The public shall have an opportunity to comment on any action item as each item is considered by the Committee prior to action being taken.)

- 4.1) Consideration and possible action on approval of minutes of meeting held February 2, 2015.
- 4.2) Discussion and review of Human Resources Calendar. (Human Resources Director Emery)
- 4.3) Discussion and review of job descriptions for Customer Care Department and Finance Department. (Human Resources Director Emery)
- 4.4) Discussion and review of Customer Service Survey. (Senior Customer Care Rep. Hernandez)
- 4.5) Discussion and possible action on development of a Wellness Program. (Chair Mac Laren/Human Resources Director Emery)
- 4.6) Discussion and possible action on retirement benefits. (Chair Mac Laren/Human Resources Director Emery)
- 5) Project Updates:
 - 5.1) Status on Customer Service 2015 Campaign. (General Manager LaMoreaux)
 - 5.2) Status on Organizational Assessment. (General Manager LaMoreaux)
 - 5.3) Other.
- 6) Information items.
- 7) Board members' requests for future agenda items.
- 8) Adjournment.



DENNIS D. LaMOREAUX,
General Manager

DDL/dd

**PALMDALE WATER DISTRICT
BOARD MEMORANDUM**

DATE: February 25, 2015 **March 2, 2015**
TO: PERSONNEL COMMITTEE **Committee Meeting**
FROM: Jennifer Emery, Human Resources Director
VIA: Mr. Dennis D. LaMoreaux, General Manager
RE: *AGENDA ITEM NO. 4.3 – DISCUSSION AND REVIEW OF JOB DESCRIPTIONS FOR CUSTOMER CARE DEPARTMENT AND FINANCE DEPARTMENT.*

Attached for discussion and review are the job descriptions for the Customer Care Department and the Finance Department.

Supporting Documents:

Job descriptions for:

- Finance Manager/CFO
- Customer Care Supervisor
- Senior Customer Care Representative
- Senior Field Customer Care Representative
- Customer Care Representative I/II
- Field Customer Care Representative II
- Customer Account Technician

FINANCE MANAGER/CFO

FLSA Status: Exempt

DEFINITION

To plan, organize, direct and review the activities and operations of the Finance Department including accounting and payroll; to coordinate assigned activities with other departments and outside agencies; and to provide highly responsible and complex administrative support to the General Manager/CEO and Assistant General Manager/COO.

SUPERVISION RECEIVED AND EXERCISED

Receives administrative direction from the General Manager/CEO and Assistant General Manager/COO.

Exercises direct supervision over Customer Finance Supervisor and Accounting Supervisor and any other assigned supervisory, professional, and administrative support staff.

EXAMPLES OF ESSENTIAL DUTIES - Duties may include, but are not limited to, the following:

Develop, plan and implement department goals and objectives; recommend and administer policies and procedures.

Coordinate department activities with those of other departments and outside agencies and organizations; provide staff assistance to the Board of Directors, General Manager/CEO, and Assistant General Manager/COO; prepare and present staff reports and other necessary correspondence.

Direct, oversee and participate in the development of the department's work plan; assign work activities, projects and programs; monitor work flow; review and evaluate work products, methods and procedures.

Coordinate and oversee preparation of the District-wide annual budget; supervise and participate in the development and administration of the Finance Department budget; direct the forecast of additional funds needed for staffing, equipment, materials, supplies, and services; monitor and approve expenditures; implement mid-year adjustments.

Select, train, motivate and evaluate personnel; provide or coordinate staff training; conduct performance evaluations; implement discipline procedures; maintain discipline and high standards necessary for the efficient and professional operation of the department.

Prepare and approve adjusting journal entries; close year end accounts and oversee preparation for audits; ensure outside auditors are provided with test documents, sub-ledgers and reconciliations.

Work with outside consultants in investigating alternatives and recommending investment strategies for District funds.

Prepare and/or oversee required periodic financial statements and budget reports; review general ledger postings from accounts payable and accounts receivable; establish and maintain internal controls.

Review and manage various contracts and agreements; prepare requests for information/proposals; prepare various cost analyses; assist in rate studies; and prepare special revenue/expense reports.

Represent the department to outside groups and organizations; participate in outside community and professional groups and committees; provide technical assistance as necessary.

Research and prepare technical and administrative reports and studies; prepare written correspondence as necessary.

Build and maintain positive working relationships with co-workers, other District employees and the public using principles of good customer service.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

Principles and practices of financial management and governmental accounting standards.

Principles and practices of information technology as related to financial reporting and recordkeeping.

Principles and practices of leadership, motivation, team building and conflict resolution.

Pertinent local, State and Federal laws, rules and regulations.

Organizational and management practices as applied to the analysis and evaluation of programs.

Principles and practices of organization, administration and personnel management.

Principles and practices of budget preparation and administration.

Ability to:

Plan, direct and control the administration and operations of the Administrative Services Department.

On a continuous basis, analyze budget and technical reports; interpret and evaluate staff reports and related documents; know and interpret laws, regulations, codes and procedures; observe performance and evaluate staff; problem solve department related issues; and explain and interpret policy.

On a continuous basis, sit at desk and in meetings for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone; write or use a keyboard to communicate through written means; and lift or carry weight up to 20 pounds.

Coordinate and oversee preparation of the District's annual budget; prepare and administer the Finance Department budget.

Develop and implement department policies and procedures.

Supervise, train and evaluate assigned personnel.

Gain cooperation through discussion and persuasion.

Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.

Interpret and apply District and department policies, procedures, rules and regulations.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of work.

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Seven years of increasingly responsible experience in financial management, including three years of administrative and management responsibility; public sector experience is highly desirable.

Training:

Equivalent to a Bachelor's degree from an accredited college or university with major course work in finance, accounting, business administration, public administration or a related field.

License and Certificate

Possession of, or ability to obtain, a valid California Driver's License.

Possession of, or ability to obtain, certification as a Certified Public Accountant (CPA) as awarded by the American Institute of Certified Public Accountants is highly desired.

Required use of cell phone with data plan.

Approved:

I have reviewed this job description with my Supervisor and agree with its contents.

Employee Signature

Date

Supervisor Signature

Date

The specific statements shown in each section of this job description are not intended to be all-inclusive. They represent typical elements and criteria necessary to successfully perform the job.

CUSTOMER CARE SUPERVISOR

FLSA Status: Exempt

DEFINITION

To plan, organize, direct and supervise the Customer Care Department, and to perform a variety of technical tasks relative to assigned area of responsibility.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the General Manager.

Exercises direct supervision over the Senior Customer Care Representative and the Senior Field Customer Service Representative and any other assigned customer care support staff.

EXAMPLES OF ESSENTIAL DUTIES - Duties may include, but are not limited to, the following:

Recommend and assist in the implementation of goals and objectives; establish schedules and methods for customer care operations; implement policies and procedures.

Plan, prioritize, assign, supervise and review the work of staff involved in customer care operations including receipt and posting of payments; processing of water service applications, and response to customer inquiries.

Evaluate operations and activities of assigned responsibilities; recommend improvements and modifications; prepare various reports on operations and activities.

Participate in budget preparation and administration; prepare cost estimates for budget recommendations; submit justifications for staff, supplies, equipment, and services; monitor and control expenditures.

Participate in the selection of staff; provide or coordinate staff training; conduct employee performance evaluations; work with employees to correct deficiencies; implement discipline procedures.

Ensure that customer accounts are properly established, maintained, and monitored; oversee water service application process.

Oversee daily processing of customer payments and receipts; ensure daily reconciliation of cash register receipts.

Oversee issuance of water service turn-on, shut-offs, and other service orders; ensure assigned staff comply with related District policies and procedures.

Answer questions and provide information to the public; investigate complaints and recommend corrective action as necessary to resolve complaints.

Build and maintain positive working relationships with co-workers, other District employees and the public using principles of good customer service.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

Principles and practices of customer care, interaction with the public and record-keeping, including use of computerized systems.

Principles and practices of supervision, training and performance evaluations.

Principles and practices of budget monitoring.

Record keeping techniques, research, and statistical methods.

Principles and practices of safety management.

Pertinent local, State and Federal laws, ordinances and rules.

Ability to:

Organize, implement and direct customer care operations/activities.

On a continuous basis, know and understand all aspects of the job; intermittently analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe and problem solve operational and technical policy and procedures; explain regulations, policies, and procedures to the public, developers, contractors, consultants, and District staff.

On a continuous basis, sit at desk for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone, write or use a keyboard to communicate through written means; and lift or carry weight up to 20 pounds.

Interpret and explain pertinent District and department policies and procedures.

Assist in the development and monitoring of an assigned program budget.

Develop and recommend policies and procedures related to assigned operations.

Supervise, train and evaluate assigned staff.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of work.

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Three years of increasingly responsible experience in customer service, credit operations, or utility billing; including one year providing technical and functional supervision over assigned personnel.

Training:

Equivalent to the completion of the twelfth grade supplemented by college course work in accounting, computer science or a related field.

License and Certificate

Possession of, or ability to obtain, a valid California Driver's License.

Approved:

I have reviewed this job description with my Supervisor and agree with its contents.

Employee Signature

Date

Supervisor Signature

Date

The specific statements shown in each section of this job description are not intended to be all-inclusive. They represent typical elements and criteria necessary to successfully perform the job.

DRAFT

SENIOR CUSTOMER CARE REPRESENTATIVE

FLSA Status: Non - Exempt

DEFINITION

To organize, assign and review the work of assigned personnel engaged in customer care activities including processing payments and response to customer inquiries; to perform duties requiring specialized knowledge; and to provide administrative support to assigned supervisor. To solve customer challenges to the satisfaction of the customer.

DISTINGUISHING CHARACTERISTICS

This is the advanced journey level in the Customer Care Representative series. Positions at this level are distinguished from other classes within the series by the level of responsibility assumed, complexity of duties assigned, independence of action taken, by the amount of time spent performing the duties, and by the nature of the public contact made. Employees perform the most difficult and responsible types of duties assigned to classes within this series, including providing technical and functional supervision over assigned personnel and respond to and resolve sensitive or difficult customer situations. Employees at this level are required to be fully trained in all procedures related to assigned areas of responsibility.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Customer Care Supervisor.

Exercises technical and functional supervision over assigned customer care staff.

EXAMPLES OF ESSENTIAL DUTIES - Duties may include, but are not limited to, the following:

Plan, prioritize, and review the work of staff assigned to a variety of customer care activities.

Develop schedules and methods to accomplish assignments ensuring work is completed in a timely and efficient manner.

Participate in evaluating the activities of staff, recommending improvements and modifications.

Provide and coordinate staff training.

Senior Customer Care Representative

- 2 -

Accept applications for service and enter data into a computerized system; set up new accounts for residents or developers/contractors for new parcels and construction meters; review associated documents such as deeds, rental agreements, and drivers' licenses.

Interact with field staff regarding service start-up; request investigation of field conditions,; prepare related service tags and work orders.

Receive and process payments and customer deposits and ; sort payments by category and use a computerized system to enter payments, and balance and post data.

Perform the most difficult work related to customer care duties including investigating and resolving sensitive and/or complex customer account matters.

Assign registers and daily reconciliation.

Build and maintain positive working relationships with co-workers, other District employees and the public using principles of good customer care.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

Principles and practices of technical and functional supervision and training.

Practices and procedures related to accounting for cash receipts and maintenance of customer accounts.

Computerized customer billing and reporting systems.

Principles and practices of customer care and interaction with the public.

Ability to:

Provide technical and functional supervision over assigned staff; effectively train staff.

Perform the most complex duties related to customer care interactions and accounting processes.

Intermittently, review documents related to customer care operations; observe, identify and problem solve office operations and procedures; understand, interpret

Senior Customer Care Representative

- 3 -

and explain customer care and District policies and procedures; explain operations and problem solve office issues for the public and with staff.

On a continuous basis, sit at desk or stand at a public counter for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone, write or use a keyboard to communicate through written means; and lift or carry weight up to 20 pounds.

Perform a variety of difficult and complex financial recordkeeping and accounting support work.

Analyze difficult customer care problems, evaluate alternatives and resolve issues.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of work.

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible journey level experience performing duties similar to a Customer Care Representative II with the Palmdale Water District.

Training:

Equivalent to the completion of the twelfth grade. Customer Care certification is required along with additional specialized training in customer billing and accounting, computer science or a related field.

License and Certificate

Possession of, or ability to obtain, a valid California Driver's License.

Approved:

Senior Customer Care Representative

- 4 -

I have reviewed this job description with my Supervisor and agree with its contents.

Employee Signature

Date

Supervisor Signature

Date

The specific statements shown in each section of this job description are not intended to be all-inclusive. They represent typical elements and criteria necessary to successfully perform the job.

DRAFT

SENIOR FIELD CUSTOMER CARE REPRESENTATIVE

FLSA Status: Non-Exempt

DEFINITION

To organize, assign and review the work of assigned personnel engaged in reading water meters and recording customer water consumption and in performing a variety of field customer care functions; to perform duties requiring specialized knowledge; and to provide administrative support to the General Manager.

DISTINGUISHING CHARACTERISTICS

This is the advanced journey level in the Field Customer Care Representative series. Positions at this level are distinguished from other classes within the series by the level of responsibility assumed, complexity of duties assigned, independence of action taken, by the amount of time spent performing the duties, and by the nature of the public contact made. Employees perform the most difficult and responsible types of duties assigned to classes within this series, including providing technical and functional supervision over assigned personnel and resolve difficult or sensitive issues in the field with inspectors, contractors, or customers and make difficult meter calibrations. Employees at this level are required to be fully trained in all procedures related to assigned areas of responsibility.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Customer Care Supervisor.

Exercises technical and functional supervision over assigned field customer care staff.

EXAMPLES OF ESSENTIAL DUTIES - Duties may include, but are not limited to, the following:

Plan, prioritize, and review the work of staff assigned to a variety of water meter reading and customer consumption recording duties.

Develop schedules and methods to accomplish assignments ensuring work is completed in a timely and efficient manner.

Participate in evaluating the activities of staff, recommending improvements and modifications.

Provide and coordinate staff training; work with employees to correct deficiencies.

Senior Field Customer Care Representative

- 2 -

Read water meters and record consumption.

Monitor consistency and accuracy of meter readings; document and report unusual readings and/or circumstances for follow up; perform leak detection checks as requested or according to observation.

Re-read meters in cases of unusual billings or consumption patterns; conduct flow tests to assess accuracy of meter readings.

Respond to customer inquiries or complaints in the field, including matters such as water conservation, water delivery service, water quality, meter reading accuracy, and high/low water pressure.

Confirm accurate water meter registration/consumption readings.

Perform equipment calibration and pressure checks; pull meters for shop service and install new meters as necessary.

Distribute and place door hanger tags as notification regarding non-payment and related matters, and scheduled and/or emergency shut-offs.

Interact with the public while performing meter reading duties and receive, record, and report complaints or concerns, including high levels of water usage; follow up as needed, including issuance of fines.

Turn on or turn off water service per authorized instructions; shut and lock services; remove meters as directed.

Work with customer care and engineering staff in verifying addresses for new or existing water services to confirm accurate installation, service and billing addresses.

Diagnose, repair, or replace radio transmitting devices or non-functional registers on water meters.

Perform the most difficult work related to meter reading and recording of customer water consumption including resolving sensitive issues in the field with inspectors, contractors, or customers, making difficult meter calibration, and handling difficult meter re-readings and change-out of meters.

Build and maintain positive working relationships with co-workers, other District employees and the public using principles of good customer care.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

Principles and practices of technical and functional supervision and training, including safety practices and related record-keeping.

Pertinent water utility industry standards and regulations.

Methods, techniques, tools, equipment and materials used in installation, maintenance, repair, and testing of water meters and meter reading devices.

Basic principles of arithmetic, including addition, subtraction, multiplication, division, and percentages.

Computer skills as necessary to perform job duties.

Ability to:

Provide technical and functional supervision over assigned staff; effectively train staff.

Perform the most complex duties related to water meter reading, meter calibration, installation, maintenance, repair, and testing duties.

On a continuous basis, know and understand operations and observe safety rules; intermittently analyze problem situations and/or equipment; identify and interpret technical and numerical information; observe and problem solve operational and technical policies and procedures; determine compliance; identify, interpret, explain and enforce violations; identify and locate site locations, interpret work orders, remember equipment locations and explain job to others.

Intermittently, walk stand, kneel, climb, and bend in the field; sit while studying or preparing reports and driving in vehicle; perform simple and power grasping, pushing, pulling and fine manipulation; intermittently write or use a keyboard to communicate; and lift or carry weight up to 50 pounds.

Design, modify, and schedule meter route activities to accomplish maximum efficiency and effectiveness.

Operate and program automated meter reading equipment.

Work outdoors in a variety of weather conditions.

Work assigned shift schedules, be available for call back.

Senior Field Customer Care Representative

- 4 -

Keep records and make reports; use a personal computer to enter and retrieve data; track works status and communicate electronically.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of work.

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible journey level experience performing duties similar to a Field Customer Care Representative II with the Palmdale Water District.

Training:

Equivalent to the completion of the twelfth grade. Additional specialized training in water utility systems, methods, and procedures or a related field is desirable.

License and Certificate

Possession of, or ability to obtain, a valid California Driver's License.

Possession of a Distribution Operator Grade 2 Certificate as issued by the State of California Department of Public Health.

Possession of a Distribution Operator Grade 3 Certificate as issued by the State of California Department of Public Health is desired.

May be required to obtain special certifications.

Approved:

CUSTOMER CARE REPRESENTATIVE I
CUSTOMER CARE REPRESENTATIVE II

FLSA Status: Non-Exempt

DEFINITION

To solve customer challenges to the satisfaction of the customer; to receive and process applications for service and payments for water service; to respond to customer inquiries and complaints; and to perform varied and routine customer care duties.

DISTINGUISHING CHARACTERISTICS

Customer Care Representative I - This is the entry level class in the Customer Care series. Positions in this class typically have little or no directly related work experience and work under immediate supervision while learning job tasks. The Customer Care Representative I class is distinguished from the II level by the performance of less than the full range of duties assigned to the II level. Incumbents work under immediate supervision while learning job tasks, progressing to general supervision as procedures and processes of assigned area of responsibility are learned.

Customer Care Representative II - This is the journey level class in the Customer Care series and is distinguished from the I level by the assignment of the full range of duties. Employees at this level receive only occasional instruction or assistance as new, unusual or unique situations arise and are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the I level.

This class is distinguished from the Senior Customer Care Representative in that the latter is an advanced journey level class responsible for highly complex customer care work and exercises technical and functional supervision over assigned staff.

SUPERVISION RECEIVED AND EXERCISED

Customer Care Representative I

Receives immediate supervision from the Senior Customer Care Representative; may receive technical and functional supervision from a Customer Care Representative II.

Customer Care Representative 2

Receives general supervision from the Senior Customer Care Representative.

EXAMPLES OF ESSENTIAL DUTIES - Duties may include, but are not limited to, the following:

Serve as a counter representative or telephone representative, accepting applications for service, closing accounts, answering customer account inquiries, and providing routine changes to accounts within established standards and guidelines; provides a professional image to customers, co-workers, and other agencies.

Respond to a variety of customer care questions and provide assistance regarding matters such as the status of accounts, water service application processes, water quality, and District policies and procedures; refer to appropriate departments as necessary.

Receive and process payments and customer deposits and ; sort payments by category and use a computerized system to enter payments, and balance and post data.

Balance cash receipts; verify and reconcile computer produced reports and records; adjust customer accounts and grant payment extensions and waive fees as appropriate.

Accept applications for service and enter data into a computerized system; set up new accounts for residents or developers/contractors for new parcels and construction meters; review associated documents such as deeds, rental agreements, and drivers' licenses. Complete quality control on processing of move in/out requests.

Process closing account requests.

Respond to customer emails.

Process deposit refund requests.

Accept applications for the rate assistance program and process leak and number of occupants' variance applications.

Interact with field staff regarding service start-up, and scheduled or immediate shut-downs; request investigation of field conditions; prepare related service tags and work orders.

Perform a variety of clerical duties including typing, document scanning, and filing.

Build and maintain positive working relationships with co-workers, other District employees and the public using principles of good customer care.

Perform related duties as assigned.

Additional Duties for Customer Care Representatives II:

Assists other office personnel in clerical, accounting and billing functions as necessary.

Assists in resolving the more complex customer care issues and complaints.

Trains Customer Care Representative I's and other support staff

Cross trains to assist in billing or accounting functions as necessary.

Performs all of the duties of a Customer Care Representative I.

MINIMUM QUALIFICATIONS

Customer Care Representative I

Knowledge of:

Modern office procedures, methods, and computer systems and equipment.

Principles and practices of customer care and interaction with the public.

Basic record keeping practices and procedures.

Basic arithmetic functions including addition, subtraction, multiplication, division and calculation of percentages and fractions.

Principles and practices of basic business correspondence including proper English usage, spelling, punctuation, and grammar.

Ability to:

Perform a wide variety of clerical and accounting customer care duties.

Intermittently, review documents related to assigned duties; observe, identify and problem solve office operations and procedures; understand, interpret and explain District and department policies and procedures; explain operations and problem solve office issues for the public and with staff.

On a continuous basis, sit at desk and/or stand at counter for long periods of time; intermittently twist and reach office equipment; write and use keyboard to communicate through written means; lift or carry weight up to 20 pounds.

Learn to use specialized customer service information software.

Learn pertinent District and department policies.

Learn principles and practices of billing and collections; learn to apply balancing techniques with speed and accuracy.

Perform rapid and accurate arithmetic calculations; use a 10 key calculator.

Perform detailed and accurate clerical work while experiencing frequent interruption.

Set up and maintain manual and computerized records, files, and accounts.

Obtain customer information by asking relevant questions; deal firmly and courteously with the public.

Analyze situations quickly and objectively; determine proper course of action within scope of assigned responsibility.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of work.

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

One year of clerical and accounting experience in a customer care environment is desirable.

Training:

Equivalent to the completion of the twelfth grade.

License and Certificate

FIELD CUSTOMER CARE REPRESENTATIVE II

FLSA Status: Non-Exempt

DEFINITION

Perform a variety of field customer care related activities for both internal and external customer requests which include emergency shut off, water waste notices, turn on/off services, verifying the accuracy of water meter reads, leak at meter, verifying the accuracy of meter and related equipment and to interact with the public in the course of field activities.

DISTINGUISHING CHARACTERISTICS

Position receives only occasional instruction or assistance as new, unusual or unique situations arise and are fully aware of the operating procedures and policies within the work unit.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Senior Field Customer Care Representative.

EXAMPLES OF ESSENTIAL DUTIES - Duties may include, but are not limited to, the following:

Perform equipment calibration and pressure checks.

Distribute and place door hanger tags as notification regarding non-payment and related matters, scheduled and/or emergency shut-offs.

Handle and report findings for various work order requests such as: confirm accuracy of water meter registration/consumption readings; check for leaks, emergency repair shut offs, and verifying meter and/or radio unit is working properly.

Turn on/off water service per authorized instructions; shut off and lock service; remove meters as directed.

Interact with the public while in the field; receive, record, and report complaints or concerns; follow up as needed and refer to other District staff as appropriate.

Work with customer care and/or engineering staff in verifying addresses for new or existing water services to confirm accurate construction, service, and billing addresses.

Build and maintain positive working relationships with co-workers, other District employees and the public using principles of good customer care.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

Basic principles of arithmetic, including addition, subtraction, multiplication, division, and percentages.

Basic practices and methods of record keeping.

Advanced customer interaction.

Repair and installation of utility meters and meter reading devices and related equipment.

How to use hundred-scale map and/or GIS system to find service line, meters and/or shut off valves in street to be able to isolate a service.

Ability to:

Perform a variety of field customer care activities related to the installation, repair, and calibration of water meters.

Perform angle stop replacement.

On a continuous basis, know and understand operations and observe safety rules; intermittently analyze problem situations and/or equipment; identify and locate site locations; interpret work orders, remember equipment location, and explain job to others.

Intermittently, sit while studying or preparing reports and/or driving; bend, squat, kneel, twist, and walk long distances when performing field duties; perform simple and power grasping, pushing, pulling, and fine manipulation; and lift or carry weight up to 50 pounds.

Learn geography and street/road locations within the District's jurisdiction.

Learn to use a computer to access customer care database system for performing work orders in the field and to retrieve and enter data.

Deal tactfully with customers encountered in the field.

Work outdoors in a variety of weather conditions.

Work assigned shift schedules; be available for call back.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of work.

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible experience similar to a Field Customer Care Representative 1 with the Palmdale Water District.

Training:

Equivalent to completion of the twelfth grade.

License and Certificate

Possession of, or ability to obtain, a valid California Driver's License.

Possession of a Distribution Operator Grade 2 Certificate as issued by the State of California Department of Public Health is desired.

Approved:

I have reviewed this job description with my Supervisor and agree with its contents.

Employee Signature

Date

Supervisor Signature

Date

The specific statements shown in each section of this job description are not intended to be all-inclusive. They represent typical elements and criteria necessary to successfully perform the job.

CUSTOMER ACCOUNT TECHNICIAN

FLSA Status: Non-Exempt

DEFINITION

To process customer billings; process night drop and mailed payments; coordinate customer collections; and to perform varied and routine customer accounting duties.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Customer Finance Supervisor.

EXAMPLES OF ESSENTIAL DUTIES - Duties may include, but are not limited to, the following:

Respond to a variety of customer questions and provide assistance regarding billing, door tags, shut-offs, and collections.

Receive and process night drop payments/payments by mail and customer deposits and general ledger receipts; sort payments by category and use a computerized system to enter payments, and balance and post data.

Follow up on after-hours reports.

Coordinate the collections process for both current and former customers of the District.

Interact with field staff regarding service start-up; request investigation of field conditions, inconsistent or unusual meter readings, meter audits/meter re-reads; prepare related service tags and work orders.

Process rejected payments.

Process all returned mail and update mailing addresses from postal service.

Coordinate lien placement; process payoff demands and bankruptcies.

Perform a variety of clerical duties including typing, document scanning, and filing.

Build and maintain positive working relationships with co-workers, other District employees and the public using principles of good customer service.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

Modern office procedures, methods, and computer systems and equipment.

Principles and practices of customer service and interaction with the public.

Basic record keeping practices and procedures.

Basic arithmetic functions including addition, subtraction, multiplication, division and calculation of percentages and fractions.

Principles and practices of basic business correspondence including proper English usage, spelling, punctuation, and grammar.

Advanced practices and procedures related to accounting for cash receipts and maintenance of revenue accounts.

District policies and procedures related to billings, account maintenance, and application for service.

Ability to:

Perform a wide variety of clerical and accounting customer accounting duties.

Independently perform responsible clerical and accounting customer service work.

Learn/use specialized customer service information software, financial reporting software, and automated meter reading software.

Intermittently, review documents related to assigned duties; observe, identify and problem solve office operations and procedures; understand, interpret and explain District and department policies and procedures; explain operations and problem solve office issues for the public and with staff.

On a continuous basis, sit at desk and/or stand at counter for long periods of time; intermittently twist and reach office equipment; write and use keyboard to communicate through written means; lift or carry weight up to 20 pounds.

Learn pertinent District and department policies.

Learn principles and practices of billing and collections; learn to apply balancing techniques with speed and accuracy.

Perform rapid and accurate arithmetic calculations; use a 10 key calculator.

Perform detailed and accurate clerical work while experiencing frequent interruption.

Set up and maintain manual and computerized records, files, and accounts.

Obtain customer information by asking relevant questions; deal firmly and courteously with the public.

Analyze situations quickly and objectively; determine proper course of action within scope of assigned responsibility.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of work.

Experience and Training

Any combination of experience and training that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required knowledge and abilities would be:

Experience:

Two years of responsible journey level experience performing accounting/clerical/billing/collection duties desirable.

Training:

Equivalent to the completion of the twelfth grade. Additional specialized training in billing and accounting is desired.

License and Certificate

Possession of, or ability to obtain, a valid California Driver's License.

Approved:

I have reviewed this job description with my Supervisor and agree with its contents.

Employee Signature

Date

Supervisor Signature

Date

The specific statements shown in each section of this job description are not intended to be all-inclusive. They represent typical elements and criteria necessary to successfully perform the job.

DRAFT