

STAFF REPORT

To: Coastside County Water District Board of Directors

From: Mary Rogren, Assistant General Manager

Agenda: September 12, 2017

Report

Date: September 8, 2017

Subject: **Approval of changes to Class Specifications for the Office Specialist I and II positions (including renaming the positions to "Customer Service" Specialist I/II);**
Approval of reclassification of "Customer Service Technician" position included in the FY2017/18 budget to "Customer Service Specialist II"

Recommendation:

1. Approve changes to the Class Specification for the Office Specialist I and II positions (including renaming the positions to "Customer Service" Specialist -- See Attachments A and B)
2. Approve reclassifying the open Customer Service Technician position (included in the FY2017/18 budget) to Customer Service Specialist II

Background:

During 2017, the District engaged Koff & Associates to perform a compensation survey. In identifying comparable positions, Koff found that most of the comparable positions for Office Specialist included "Customer Service" in the job title. In recognition of the key importance of Customer Service to the role, we recommend retitling the position to Customer Service Specialist (I/II).

In addition, the current job classification requires updating, including adding responsibilities associated with the implementation of AMI (Advanced Metering Infrastructure) and the customer web portal. The new job classification also includes a specialized area of expertise focusing on data analytics and the AMI/Web portal responsibilities.

The District currently has an open position for a Customer Service Technician position. Given the upcoming AMI deployment, Staff believes that the needs of the District (including the data input and analysis requirements of AMI) fall

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Subject: Job Classifications

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more in line with the revised Customer Service Specialist II position than the Customer Service Technician class specification approved last fiscal year. We therefore request approval to repurpose our open position to a Customer Service Specialist II.

Fiscal Impact: None. The current Office Specialist II position and the Customer Service Technician position are at the same pay grade level.

COASTSIDE COUNTY WATER DISTRICT
CLASS SPECIFICATION
~~OFFICE SPECIALIST~~CUSTOMER SERVICE SPECIALIST I

CLASS TITLE: ~~OFFICE SPECIALIST~~CUSTOMER SERVICE SPECIALIST I

DEFINITION

Under general supervision, performs a variety of responsible customer support activities related to the establishment and maintenance of customer accounts; serves as a front-line customer support position working with the public in person, on the phone or e-mail, including processing customer requests for service; utility payments; responding to customer inquiries and complaints. ~~C~~ompletes accurate and timely statements and reports related to customer accounts and District payments., ~~provides professional and comprehensive customer service, and general office staff assistance.~~ Essential functions include: customer service administration, accounts receivable/billing, accounts payable/general ledger, general office administration, and water service processing. Performs related duties as required.

DISTINGUISHING CHARACTERISTICS

This classification is the entry and full working level, and reports to the Office Manager (or designate.) Scope of work is moderately difficult in nature, encompassing a full range of customer service, secretarial and some accounting duties. Members of this class may be assigned to one of the essential areas of responsibility (accounts receivable/billing, accounts payable/general ledger, ~~eustomer service,~~ etc.) or may perform duties in several areas. Incumbents may serve as backup to other positions in the class and cross training may be required.

Incumbents receive close supervision and training initially but after a period of time are expected to perform routine tasks independently, with little or no immediate supervision.

The ~~Office Specialist~~Customer Service Specialist I is the first of two levels in the ~~Office Specialist~~Customer Service Specialist class series ~~and is a flex or slant line classification.~~ The capable, fully competent employee in this classification will perform increasingly difficult and responsible assignments. Incumbents are eligible to advance to the ~~Office Specialist~~Customer Service Specialist II level after four to five years of successful experience at the ~~Office Specialist~~Customer Service Specialist I level, demonstrated proficiency to perform higher level work of the ~~Office Specialist~~Customer Service Specialist II, recommendation of the Office Manager and approval of the General Manager.

There are no supervisory duties.

EXAMPLES OF DUTIES

Duties may include, but are not necessarily limited to:

~~Office Specialist~~Customer Service Specialist I/II

5/02September 2017

**COASTSIDE COUNTY WATER DISTRICT
CLASS SPECIFICATION**

OFFICE SPECIALIST/CUSTOMER SERVICE SPECIALIST I

Area of Responsibility:

Customer Service:

- Provides front-line customer service support by greeting customers at the front desk or by telephone, including accepting payments.
- Responds and provides information to customer inquiries and complaints in person or by telephone; researches, identifies potential causes, and provides recommendations for the resolution of unusual billing situations; represents the District to callers and visitors in a professional and customer friendly manner.
- Receives and processes service requests and transfer orders, sets up and closes accounts, processes “in and out” tags; determines and collects necessary charges; updates customer and meter information in the utility billing system.
- Utilizes the District’s enterprise systems to review and analyze customer accounts, including the District’s Utility Billing and Automated Metering Infrastructure (AMI) Systems; and Customer Web Portal.

When assigned to Accounts Receivable/Billing

- Processes customer payments and deposits;
- Supports Utility Billing Specialist as required, including preparingPrepares and sending customer bills, and notices, including fire hydrant billing, and final billing;
- Documents new and cancelled accounts, including preparing “in and out” tags and inputting changes into the computer;
- ~~Calculates high bill adjustments; resolves billing problems according to District policies;~~
- Prepares report for refunds due and processes yearly deposit refunds;
- Prepares bank deposits; balances cash drawer;
- Notifies customers of insufficient funds and tracks account for payment;
- Transfers credits and deposits between customer accounts when necessary.

When assigned to Accounts Payable/General Ledger

- Prints checks, prepares for signature, and mails payments;
- Adds new vendors, coding with appropriate account number, and enters invoices to be paid;
- Maintains, sets up, and stores accounts payable documents and project files;
- Organizes payroll timesheets, processes payroll in computer and issues paychecks and direct deposits; prepares payroll taxes;
- Calculates, verifies, and processes health benefits payments for all employees and retirees;
- Identifies and enters or adjusts monthly journal entries; calculates, verifies, and processes general ledger;
- Disburses and balances petty cash;
- Calculates fiscal year deposits.

~~Office Specialist~~Customer Service Specialist I/II

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COASTSIDE COUNTY WATER DISTRICT
CLASS SPECIFICATION
OFFICE SPECIALIST/CUSTOMER SERVICE SPECIALIST I

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Water Service Processing

- ~~Records meter changes on computer;~~
- ~~Performs data entry to put old meters in “inventory” status and new meters in “active” status;~~
- ~~Creates and adds messages categories on handheld units;~~
- ~~Initiates portable meter readings, inputs into computer, and prepares portable meter invoices~~
- ~~Compiles water sampling figures for Water Quality Report~~
- ~~Schedules appointments for inspections of retrofit toilet program;~~
- ~~Sends out fixture rebate forms~~

Customer Service Administration

- ~~Greets customers at front desk and on the telephone;~~
- ~~Accepts payments, and handles customer complaints;~~
- ~~Answers questions related to accounts, procedures, and services; assists customers with resolution of billing or service problems~~
- ~~Updates customer and meter information on computer system~~

When assigned to General Office Administration

- Performs word processing and other office duties requested by General Manager or Superintendent;
- ~~Initiates and composes District forms and letters related to assignment;~~

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- ~~Retains computer backup printout from system backup tapes; keeps tapes in bank safety deposit box;~~
 - Operates voice mail and retrieves messages from after hours, weekends, and holidays;
 - ~~Orders office supplies;~~
 - Files District correspondence, reports and other documents in timely manner;
 - Monitors and replenishes funds into postage meter, as needed.

MINIMUM QUALIFICATIONS

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

Training and Experience:

~~High School diploma or equivalent. Requires three~~

- 3+ years of customer service, secretarial and/or accounting/bookkeeping experience with a demonstrated knowledge of work processes and clerical office administration procedures. Prefer experience with a public utility.
- High School diploma or equivalent.

~~Office Specialist~~Customer Service Specialist I/II

~~5/02~~September 2017

**COASTSIDE COUNTY WATER DISTRICT
CLASS SPECIFICATION**

OFFICE SPECIALIST/CUSTOMER SERVICE SPECIALIST I

- Demonstrated proficiency with the use of computer software including MS Office (Excel and Word) and customer service/utility billing computerized systems.
- Possess California Driver's License.

Knowledge of:

- ~~Principles and practices of computer usage~~
- ~~Modern office and record keeping practices, methods, and procedures.~~
- ~~Basic record keeping practices and procedures~~
- Basic arithmetic and accounting, including the ability to perform fast and accurate calculations.
- Basic Accounting/Bookkeeping practices.
- Basic business letter writing and the standard format for reports and correspondence.
- ~~Computer word processing and spreadsheet software~~

Ability and skill to to:

- Deal tactfully with the public and others in providing information, answering questions, and providing customer service, even under difficult or stressful conditions.
- Respond to and effectively prioritize multiple phone calls and other requests or interruptions.
- Evaluate customer problems/concerns and exercise independent judgment to resolve them.
- Learn District policies and procedures regarding signup for service, payment procedures, delinquent bills, etc.
- ~~Exercise good judgment, keep calm, and make appropriate decisions under pressure~~
- Prioritize work and follow through to completion.
- Prepare and maintain neat, accurate, and concise records and reports
- Understand and carry out oral and written instructions.
- Speak and write clearly.
- Use initiative and independent judgment within established guidelines
- Establish and maintain pleasant and cooperative working relationships with employees and the general public

Skill In:

- ~~Computer operation~~
- ~~Fast and accurate arithmetic calculations~~
- ~~Operation of standard office equipment including ten-key adder, copier, fax machine, postage meter~~

COASTSIDE COUNTY WATER DISTRICT
CLASS SPECIFICATION
~~OFFICE SPECIALIST~~ CUSTOMER SERVICE SPECIALIST I

PHYSICAL REQUIREMENTS

Incumbent must be able to function in an office environment in work primarily of a sedentary nature, and be able to perform the following, with or without reasonable accommodation:

- Sit, often for long periods of time
- Utilize vision, hearing and speech
- Utilize manual and finger dexterity
- Turn head and trunk
- Move about on smooth surfaces
- Stand
- Lift and carry (maximum 35 pounds)
- Reach, twist and bend

This job specification should not be construed to imply that these requirements are the exclusive standards of the position. Each incumbent does not necessarily perform all duties.

~~Previous Title: Clerk~~

COASTSIDE COUNTY WATER DISTRICT
CLASS SPECIFICATION
~~OFFICE-CUSTOMER SERVICE~~ SPECIALIST II

CLASS TITLE: ~~OFFICE-CUSTOMER SERVICE~~ SPECIALIST II

DEFINITION

Under general supervision, ~~performs a variety of responsible customer support activities related to the establishment and maintenance of customer accounts; serves as a front-line customer support position working with the public in person, on the phone or e-mail, including processing customer requests for service; utility payments; and responding to customer inquiries and complaints;~~ administers and maintains accurate and timely statements and records for water services;~~;~~ receives, investigates, analyzes and resolves problems and inconsistencies in customer accounts in coordination with the District's field and water conservation staff;~~;~~ prepares, reviews, analyzes and interprets, ~~and adjusts~~ computer reports and data related to customer accounts and water usage.

Also performs a wide variety of accounting support duties and data analysis in the preparation, maintenance, and processing of accounting records and financial transactions, including the areas of utility billing, accounts receivable, and payroll; ; trains, assigns, and reviews work of ~~Office-Customer Service~~ Specialist I; performs related duties as assigned.

DISTINGUISHING-DISTINGUISHING CHARACTERISTICS

~~This is a single position class reporting reports~~ to the Office Manager (or designate). The ~~Office-Customer Service~~ Specialist II is the advanced journey, lead level of the ~~Office-Customer Service~~ Specialist class series. The incumbent uses considerable independent judgment and problem solving to research and resolve problems of moderate scope and complexity. This classification performs moderately responsible and difficult accounting, data analysis, and clerical duties ~~of a routine nature~~ that may require application of standard District policies and procedures, as well as development of new techniques and/or procedures. ~~The Office Specialist II has operational responsibility for the Billing unit and serves as the in-house expert on matters related to the billing system.~~ Specialized work assignments within the class may also require that the incumbent possess strong computer and data analytical skills. The incumbent provides training to subordinate ~~Office-Customer Service~~ Specialist I and provides input for performance appraisals. This class is distinguished from the Utility Billing Specialist in that the latter is responsible for overseeing all utility billing functions.

~~A~~ ~~Customer ServiceOffice~~ Specialist I is eligible to advance to the Customer ServiceOffice Specialist II level after four to five years of successful experience at the Customer ServiceOffice Specialist I level, demonstrated proficiency to perform higher level work of the Customer ServiceOffice Specialist II, recommendation of the Office Manager, and approval of the General Manager.

COASTSIDE COUNTY WATER DISTRICT
CLASS SPECIFICATION
OFFICE-CUSTOMER SERVICE SPECIALIST II

EXAMPLES OF DUTIES

Duties may include, but are not necessarily limited to:

Area of Responsibility:

Customer Service:

- Provides front-line customer service support by greeting customers at the front desk or by telephone.
- Responds and provides information to customer inquiries and complaints in person or by telephone; researches, identifies potential causes, and provides recommendations for the resolution of unusual billing situations; and represents the District to callers and visitors in a professional and customer friendly manner.
- Interprets policies and procedures and explains service fees, rates, and procedures to customers; may waive fees under appropriate circumstances and with supervisory approval.
- Receives and processes service requests and transfer orders, sets up and closes accounts, processes “in and out” tags; determines and collects necessary charges and secures legal documents regarding property descriptions and ownership; resolves issues and problems regarding the processing of orders and delinquent accounts.
- Utilizes the District’s enterprise systems to review and analyze customer accounts, including the District’s Utility Billing and Automated Metering Infrastructure (AMI) Systems; and Customer Web Portal.

When Assigned to: Accounts Receivable/Utility Billing

- Opens or receives payments, audits for correctness, inputs to computer; verifies computer reports in order to prepare bank deposits;
- Prepares, mails, and ensures the accuracy of a variety of correspondence to customers in order to maintain system efficiency including final bills, reminder notice for inactive customer accounts, and cut-off or 48-hour notices, etc.;
- Receives inquiries regarding accounts from customers over the phone, in person, mail, fax, and/or email;
- ~~Processes new and cancelled accounts by completing “in and out” tag, cut-off notices, and transferring credit between customer accounts when necessary;~~
- Prepares cut-off notices; reports for refunds due, non-sufficient funds, etc., and audits for accuracy; provides customer account information to appropriate external parties such as the accountant, city or county personnel, and collection agency. Manages customer payment plans;
- Prepares and monitors bank deposits and statements for customer receipts;
- Researches, interprets, and analyzes account history to resolve billing questions on meter reads; calculates appropriate high bills adjustments for customers and makes debit/credit adjustments in accordance with District policies.

COASTSIDE COUNTY WATER DISTRICT
CLASS SPECIFICATION
OFFICE-CUSTOMER SERVICE SPECIALIST II

When assigned to: Payroll

- Receives, reviews, verifies, and processes time recording documents to prepare payroll for all District employees; audits such documents for completeness, accuracy, and compliance with rules and regulations; prepares and balances payroll reports and records.
- Processes, calculates, and maintains records of a variety of payroll actions; maintains employee records for voluntary and non-voluntary deductions; prepares payroll warrants and wire transfers; prepares reports and payments for various tax, financial, and insurance organizations.

When assigned to: Data Analytics/Advanced Metering Infrastructure (AMI)/Web Portal Support

- In coordination with the Utility Billing Specialist, serves as a power user for the District's AMI System. Performs data entry surrounding AMI set-ups; customer "ins and outs;" meter readings for billing purposes; and daily AMI database maintenance as required.
- Daily monitors diagnostic reports from the District's AMI System, Web Portal and Utility Billing System to identify abnormal usage and leaks. Initiates field service orders to investigate potential issues.
- Implements and maintains the District's Customer Web Portal and trains customers on the use of the portal. Analyzes web portal data and follows up with customers as required.
- Proactively contacts and/or respond to inquiries from customers with high bills or abnormal usage on a timely basis.
- Generates and analyzes reports from the District's enterprise systems to flag high or low reads or unusual trends.
- Supports the Water Resources Analyst as required, including promoting water conservation efforts.
- Participates in the monthly utility billing functions in cooperation with the Utility Billing Specialist.

System Administration

- Classifies, records, inputs, and verifies numerical data for use in maintaining accounting records;
- Identifies and resolves problems with computer system related to billing and accounts receivables; suggests and implements appropriate corrective procedures;
- Compiles reports and necessary documents, spreadsheets, historical data, billing account statements and other information to answer customers' inquiries, and to complete specialized transaction;
- Prepares and maintains extensive records, files, logs, and reports (such as customer phone numbers, addresses, route and service, meter numbers, assessor parcel numbers, etc.) using a personal computer and a variety of PC applications.

Office Specialist #II

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COASTSIDE COUNTY WATER DISTRICT
CLASS SPECIFICATION
OFFICE-CUSTOMER SERVICE SPECIALIST II

Water Service Processing

- Maintains meter changes to move new meters to active status and old meters to inventory status using the computer;
- Processes shut off water service for nonpayment of bill, payments made with one check for water and miscellaneous bills (shared payment);
- Logs statistics by territory for customers signing in and out for water service;
- Creates and enters message categories on handheld units for Field crew when meter reading to indicate needed changes;
- Schedules appointments for inspections of retrofit toilet program; prepares door hangers for field crew to tag doors with shut off notices.

General Office Administration

- Operates voice mail and retrieves messages from after hours, weekends, and holidays;
- Assumes responsibility for verification of the postage meter by the post office;
- Prepares billing records for fiscal year and labels for transport to storage;

MINIMUM QUALIFICATIONS

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

Training and Experience:

- 5+ years of experience in a customer service role, preferably in a water utility or public agency.
- Demonstrated ability to problem-solve customer issues, and to deal courteously and effectively with the public. Experience in training customers on new systems is a plus.
- Demonstrated proficiency with the use of computer software and systems including MS office (Excel) and customer service/utility billing systems. For work assignments, specializing in Data Analytics/AMI/Web Portal and/or utility billing, advanced proficiency with computer systems/analytical software is required.
- Demonstrated ability to analyze large sets of data and to draw meaningful conclusions; create reports and to effectively communicate conclusions.
- College Degree is preferred, but not required.
- Possess California Driver's License.

High School diploma or equivalent.

COASTSIDE COUNTY WATER DISTRICT
CLASS SPECIFICATION
OFFICE-CUSTOMER SERVICE SPECIALIST II

~~Five years of experience in computer operation, billing, bookkeeping, typing and/or general clerical work. Two to three years in a public utility or agency is preferred.~~

~~In addition to the knowledge, abilities and skills required for the Office Specialist I, the following are required:~~

Knowledge of:

- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.
- ~~District and community programs for customers; proper customer care practice.~~
- Terminology and practices of financial and account document processing and record-keeping, including accounts receivable, accounts payable, utility billing, and payroll.
- Appropriate procedures, practices, rules, and policies governing office and/or system assignment.
- Basic business letter writing and the standard format for reports and correspondence.
- Basic meter operation and disconnection techniques.

Ability and skill to:

- Deal tactfully with the public and others in providing information, answering questions, and providing customer service, even under difficult or stressful conditions.
- Respond to and effectively prioritize multiple phone calls and other requests or interruptions.
- Evaluate customer problems/concerns and exercise independent judgment to resolve them.
- Negotiate with customers within scope of responsibility.
- Tactfully obtain sensitive information from customers, other agencies and business representatives.
- Perform a wide range of customer service functions with speed and accuracy and apply good judgment in recognizing scope of authority.
- Conduct basic research related to assignment.
- Make accurate arithmetic, financial, and statistical computations.
- Interpret and apply policies, procedures, standards and requirements related to assigned responsibilities.
- Plan, organize, coordinate, and prioritize assigned tasks to meet deadlines successfully.
- Train, guide, and coordinate the work of subordinate Office-Customer Service Specialist I.

COASTSIDE COUNTY WATER DISTRICT
CLASS SPECIFICATION
OFFICE-CUSTOMER SERVICE SPECIALIST II

- ~~• Operate specialized equipment related to assignment such as two-way radio and billing machine.~~

PHYSICAL REQUIREMENTS

Incumbent must be able to function in an office environment in work primarily of a sedentary nature, and be able to perform the following, with or without reasonable accommodation:

- Sit, often for long periods of time
- Utilize vision, hearing and speech
- Utilize manual and finger dexterity
- Turn head and trunk
- Move about on smooth surfaces
- Stand
- Lift and carry maximum 35 pounds
- Reach, twist and bend

This job specification should not be construed to imply that these requirements are the exclusive standards of the position. Not all duties are necessarily performed by each incumbent.