



PALMDALE WATER DISTRICT

A CENTURY OF SERVICE

June 10, 2021

BOARD OF DIRECTORS

AMBERROSE MERINO

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DENNIS D. LaMOREAUX

General Manager

ALESHIRE & WYNDER LLP

Attorneys



AGENDA FOR A MEETING OF THE PERSONNEL COMMITTEE OF THE PALMDALE WATER DISTRICT TO BE HELD AT 2029 EAST AVENUE Q, PALMDALE OR VIA TELECONFERENCE Committee Members: Kathy Mac Laren-Gomez-Chair, Amberrose Merino

FOR THE PUBLIC: VIA TELECONFERENCE ONLY
DIAL-IN NUMBER: 571-748-4021 ATTENDEE PIN: 344-139-976#
Submit Public Comments at: <https://www.gomeet.com/344-139-976>

**THURSDAY, JUNE 17, 2021
9:00 a.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.

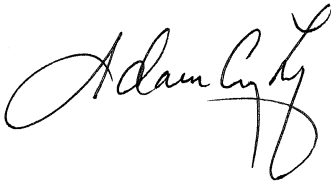
Agenda item materials, as well as materials related to agenda items submitted after distribution of the agenda packets, are available for public review at the District's office located at 2029 East Avenue Q, Palmdale (Government Code Section 54957.5). Please call Dawn Deans at 661-947-4111 x1003 for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

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 for non-agenda items.
- 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 May 20, 2021.
- 4.2) Consideration and possible action on a recommendation on updated job descriptions for the Customer Care and Finance Departments. (No Budget Impact – Human Resources Director Emery)
- 5) Reports.
 - 5.1) Human Resources Director Emery:
 - a) Personnel policy effects of COVID-19 event.
- 6) Board members' requests for future agenda items.
- 7) Date of next Committee meeting.
- 8) Adjournment.

A handwritten signature in black ink, appearing to read 'Adam C. Ly', written over a horizontal line.

ADAM C. LY,
Assistant General Manager

DDL/ACL/dd

P A L M D A L E W A T E R D I S T R I C T
B O A R D M E M O R A N D U M

DATE: June 9, 2021 **June 17, 2021**
TO: PERSONNEL COMMITTEE **Committee Meeting**
FROM: Jennifer Emery, Human Resources Director
VIA: Mr. Dennis D. LaMoreaux, General Manager
RE: ***AGENDA ITEM NO. 4.2 – CONSIDERATION AND POSSIBLE ACTION
ON A RECOMMENDATION ON UPDATED JOB DESCRIPTIONS FOR
THE CUSTOMER CARE AND FINANCE DEPARTMENTS. (NO
BUDGET IMPACT – HUMAN RESOURCES DIRECTOR EMERY)***

Recommendation:

Staff recommends that the Personnel Committee recommend full Board approval of the revised job descriptions for the Customer Care and Finance Departments.

Impact of Taking No Action:

Our prior job descriptions would remain active.

Background:

Every three years the District updates job descriptions to make sure that they list the current essential job functions and requirements for the position.

Strategic Plan Initiative/Mission Statement:

This work is part of Strategic Plan Initiative No. 2 – Organizational Excellence.
This item directly relates to the District's Mission Statement.

Budget:

There is no effect on budget.

Supporting Documents:

Customer Care Intern Job Description
Customer Care Representative 1-2 Job Description
Customer Care Supervisor Job Description
Field Customer Care Representative 1-2 Job Description
Senior Customer Care Representative Job Description
Senior Field Customer Care Representative Job Description
Accounting Supervisor Job Description
Accounts Payable Technician Job Description
Customer Account Technician Job Description
Customer Finance Supervisor Job Description
Finance Manager/CFO Job Description
Management Analyst – Finance Job Description
Purchasing Technician Job Description

PALMDALE WATER DISTRICT

CUSTOMER CARE INTERN

FLSA Status: Non-Exempt

DEFINITION

To perform a wide variety of assistance to District customers; to receive and process applications for service and payments for water service; and to perform varied and routine general office support duties.

DISTINGUISHING CHARACTERISTICS

This is the educational 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.

SUPERVISION RECEIVED AND EXERCISED

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

The program is designed to train each participant so that at the end of the program participants are able to perform assigned duties without any direct supervision. Each participant will have this opportunity by proving their ability to work independently.

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.

Responds to a variety of customer care questions and provides 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 general ledger receipts; 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.

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.

EDUCATIONAL OPPORTUNITY

The intern position will provide the following educational experiences:

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 office operations and procedures; understand, interpret and explain District and department policies and procedures.

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 care information software.

Learn pertinent District and department policies.

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.

Communicate clearly and concisely, both orally and in writing.

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

REQUIREMENTS:

Must be enrolled in college work experience program during the semester of employment to qualify.

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.

PALMDALE WATER DISTRICT

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 general ledger receipts; 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.

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, inconsistent or unusual meter readings, meter audits/meter re-reads; 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.

Cross train in both field and office customer care duties and be able to perform those duties when needed.

Perform related duties as assigned.

Additional Duties for Customer Care Representatives II:

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

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

Trains Customer Care Representative I's and other support staff

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.

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:

GED/High school diploma.

License and Certificate

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

Customer Care Representative II

In addition to the qualifications for the Customer Care Representative I:

Knowledge of:

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:

Independently perform responsible clerical and accounting customer care work.

Use specialized customer service information software.

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 responsible journey experience performing duties similar to a Customer Care Representative I with the Palmdale Water District.

Training:

GED/High School Diploma. Additional Customer Care Certification through specialized training in customer care and accounting is required.

License and Certificate

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

PHYSICAL REQUIREMENTS:

On a continuous basis, sit at desk for long periods of time; intermittently stand; walk, bend, twist, squat, and kneel while performing field work; twist to reach office equipment surrounding desk; perform simple and power grasping, pushing, pulling and fine

manipulation; use telephone and write or use a keyboard to communicate through written means; and lift or carry weight up to 25 pounds.

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.

PALMDALE WATER DISTRICT

CUSTOMER CARE SUPERVISOR

FLSA Status: Exempt

DEFINITION

Under general supervision, assigns, and reviews the work of customer care personnel who provide information, research problems, perform collections and credit arrangement activities, by telephone and in person; handles difficult, complex or sensitive customer account problems and delinquency issues; coordinates other customer service daily activities and variety of tasks relative to assigned area of responsibility.

This is the first-line supervisor level classification in the Customer Care Department. The Customer Care Supervisor provides direction to the Customer Care Department by assigning, directing and reviewing work of staff. Supervisory duties include training, writing, conducting performance appraisals, and assisting in department budget preparation. Incumbents provide coaching and guidance to representatives. Duties also include resolving escalated customer complaints and disputes and handle difficult customer delinquency and billing issues.

SUPERVISION RECEIVED AND EXERCISED

Receive direction from the General Manager.

Exercise supervision over Customer Care Department.

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

Provides day-to-day leadership to ensure a high performance, customer service-oriented work environment that supports achieving the Department's and the District's mission, objectives and values.

Prioritize, assign, evaluate and supervise the work of all Customer Care Representatives. Provides coaching and guidance for performance improvement and development; directs and oversees the training of new representatives.

Plans and implements work programs and customer care activities; modifies departmental procedures and processes; creates quality assurance tools to ensure completion, quality and timeliness.

Write and conduct formal performance appraisals: participates in a variety of personnel actions including hiring, counseling, training, promotion, discipline, and termination.

Interacts effectively and diplomatically in all areas of employee relations, always projecting a professional image in keeping with the District's goals and objectives while exercising the highest degree of confidentiality.

Maintains the daily schedule to ensure complete coverage for the District's customer base.

Assumes difficult and specialized customer relation situations, involving upset and dissatisfied customers and requiring sensitivity and sound judgment; takes action to resolve complaints where appropriate, including waiving of delinquency charges and security deposits and agreement on long term payment plans; receives and responds to correspondence and telephone calls, providing information and handling issues, request and complaints.

Attends and participates in professional group meeting; stays abreast of new trends and innovations in utility billing and customer service; directs and participates in the incorporation of new developments into program areas, as appropriate.

Assists and participates in the development and administration of the Customer Care annual budget.

Reads, understands, and ensures compliance with the PWD's Safety Policies; attends safety, meetings, as required; reports all accidents, violations, or infractions to manager.

Oversee daily processing of customer payments and receipts; ensure daily reconciliation of cash register and on-line credit card and other payment methods, ensure proper documentation for deposit transactions.

Opens, closes and locks District Administration building, sets and activates building alarm, and performs building security functions.

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:

Customer service practices and customer-oriented telephone etiquette.

Customer Care Supervisor

- 3 -

District rules and regulations, meter service operations and issues related to assigned functions.

District personnel rules and policies.

Office administrative procedures and methods.

Cash, check and credit card handling techniques.

Principles and methods of business correspondence, recordkeeping and filing.

Principles and practices of sound business communications and correct English use, including spelling, grammar and punctuation.

Appropriate safety precautions, procedures, practices and regulations related to maintain a department safety program, safe working conditions, and operating equipment.

Modern office equipment, software programs, and computerized record keeping and filing methods.

General business mathematics and calculations.

Principles and practices of effective leadership and employee supervision, including training and performance evaluation.

Principles and practices of budget monitoring.

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

Ability to:

Supervise, assign, inspect and evaluate the work of others.

Communicate effectively, both verbally and in written formats.

Motivate and evaluate staff and provide for their training and development.

Develop and implement work standards.

Plan and organize work to meet changing priorities and deadlines.

Analyze and resolve complex customer service problems.

Exercise independent judgment and initiative.

Train and orient new and existing employees.

Perform general maintenance and review of customer accounts.

Analyze, interpret and explain District policies to customers, and deal with them in a tactful and courteous manner.

Maintains and directs the daily activities such as work orders, phones, counter, reception, and any departmental duties.

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

Establish and prioritize action items and multitask effectively.

Prepares concise records, reports and other written materials.

Use creative thought to problem solve including the use of new and innovative technologies and techniques.

Participate in groups and committees that affect District operations, policies and procedures.

Use Microsoft Outlook including accessing forms within public folders, send and receive email and use the calendar and scheduling functions effectively.

Maintain physical condition appropriate to the performance of assigned duties and responsibilities.

Maintain mental capacity, which allows the capability of making sound decisions and demonstrate intellectual capabilities.

Maintain effective audio-visual discrimination and perception needed for making observations, communicating with others, reading, writing, and operating assigned equipment.

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

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 customer care and billing; including three years providing technical and functional supervision over assigned personnel.

Training:

Equivalent to Associates Degree in business, customer service or a related field.

License and Certificate

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

AWWA Customer Care Training.

PHYSICAL REQUIREMENTS:

On a continuous basis, sit at desk for long periods of time; intermittently stand; walk, bend, twist, squat, and kneel while performing field work; twist to reach office equipment surrounding desk; perform simple and power grasping, pushing, pulling and fine manipulation; use telephone and write or use a keyboard to communicate through written means; and lift or carry weight up to 25 pounds.

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.

PALMDALE WATER DISTRICT

FIELD CUSTOMER CARE REPRESENTATIVE I

FIELD CUSTOMER CARE REPRESENTATIVE II

FLSA Status: Non-Exempt

DEFINITION

To perform a variety of field service activities including installation, repair, and calibration of water meters and radio transmitting devices; to read, collect, and record water consumption from meters and radio transmitting devices; to read, collect, and record water consumption from meters; and to interact with the public in the course of field activities.

DISTINGUISHING CHARACTERISTICS

Field Customer Care Representative I – This is the entry level class in the Field 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 Field 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.

Field Customer Care Representative II – This is the journey level class in the Field 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.

SUPERVISION RECEIVED AND EXERCISED

Field Customer Care Representative I – Receives general supervision from the Senior Field Customer Care Representative; receives technical and functional supervision from Field Customer Care Representative II.

Field Customer Care Representative II – Receives general supervision from the Senior Field Customer Care Representative; receives technical and functional supervision from the Senior Field Customer Care Representative.

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

Field Customer Care Representative I

Perform all meter reading functions.

Field Customer Care Representative II

Leak assessment. Including, but not limited to, service line, main line, and customer side versus Palmdale Water District responsibility.

Perform equipment/meter calibration and pressure checks.

USA markouts and protocol.

Replace angle stops.

Customer service line repair.

Distribute and place door hanger tags, scheduled and/or emergency shut-offs.

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

Locate valves and isolation valves.

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.

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

Cross train in both field and office customer care duties and be able to perform those duties when needed.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Field Customer Care Representative 1 and 2
Customer Care
- 3 -

Field Customer Care Rep I:

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 hunter scale 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.

Field Customer Care Representative 1 and 2

Customer Care

- 4 -

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 responsible experience in a position involving substantial public contact is desirable.

Training:

GED/High School Diploma.

License and Certificate

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

Possession of a Distribution Operator Grade 1 Certificate as issued by the Water Resources Control Board is desired.

Field Customer Care Rep II:

Knowledge of:

All knowledge required of Field Customer Care Representative I.

Extensive knowledge required to answer a variety of customer inquiries.

Ability to:

All abilities possessed by a Field Customer Care Representative I.

Ability to complete pressure tests, meter calibrations, angle stop replacements and more advanced related issues with little or no direction from the Senior Field Customer Care Representative.

Field Customer Care Representative 1 and 2
Customer Care
- 5 -

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 responsible experience in a position equivalent to a Field Customer Care Representative I.

Training:

GED/High School Diploma.

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 Water Resources Control Board.

Possession of a Treatment Operator Grade 1 Certificate as issued by the Water Resources Control Board is desirable.

PHYSICAL REQUIREMENTS

Constantly, walk stand, kneel, climb, and bend in the field; sit while studying or preparing reports and driving in vehicle or operating equipment; 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 60 pounds. Additionally, the incumbent in this position works outdoors in all weather conditions, including wet, hot and cold with extreme sun exposure. Some of these requirements may be accommodated for otherwise qualified individuals requiring and requesting such accommodations.

Approved:

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

Employee Signature

Date

Supervisor Signature

Date

Field Customer Care Representative 1 and 2

Customer Care

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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.

PALMDALE WATER DISTRICT

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.

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, inconsistent or unusual meter readings, meter audits/meter re-reads; prepare related service tags and work orders.

Receive and process payments and customer deposits and general ledger receipts; 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 billing and collection matters.

Assign registers, daily reconciliation and posting.

Process deposit refund requests.

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 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:

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

Training:

GED/High School Diploma. 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.

AWWA Customer Service Certificate Program.

PHYSICAL REQUIREMENTS:

On a continuous basis, sit at desk for long periods of time; intermittently stand; walk, bend, twist, squat, and kneel while performing field work; twist to reach office equipment surrounding desk; perform simple and power grasping, pushing, pulling and fine manipulation; use telephone and write or use a keyboard to communicate through written means; and lift or carry weight up to 25 pounds.

Approved:

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

Employee Signature

Date

Supervisor Signature

Date

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PALMDALE WATER DISTRICT

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.

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.

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:

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

Training:

GED/High School Diploma. 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.

PHYSICAL REQUIREMENTS

Senior Field Customer Care Representative

- 5 -

Constantly, walk stand, kneel, climb, and bend in the field; sit while studying or preparing reports and driving in vehicle or operating equipment; 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 60 pounds. Additionally, the incumbent in this position works outdoors in all weather conditions, including wet, hot and cold with extreme sun exposure. Some of these requirements may be accommodated for otherwise qualified individuals requiring and requesting such accommodations.

Approved:

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

Employee Signature

Date

Supervisor Signature

Date

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PALMDALE WATER DISTRICT

ACCOUNTING SUPERVISOR

FLSA Status: Exempt

DEFINITION

To plan, organize, direct and supervise assigned personnel engaged in technical and clerical accounting activities including accounts payable/receivable, payroll and fixed assets; purchasing and inventory; to perform a variety of complex and difficult professional accounting tasks; and to provide administrative support to the Finance Manager/CFO.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the Finance Manager/CFO.

Exercises direct supervision over assigned technical and financial 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 a variety of revenue and expenditure accounting and payroll activities, including purchasing; implement policies and procedures.

Plan, prioritize, and supervise the work of staff involved in a variety of accounting activities.

Assist in preparation of the District-wide annual budget including forecasting of future revenue levels and expenditure patterns; participate in accounting function 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..

Prepare, maintain, and analyze a variety of fiscal and accounting records, statements, and reports.

Identify trends and irregularities in reported fiscal transactions; research and make recommendations for modifications to internal procedures and policies and/or external reporting requirements.

Oversee reconciliation of banking processes; and maintain and review detailed sub-ledgers such as capital improvement projects, accounts payable, accounts receivable, developer deposits and customer deposits.

Review the general ledger in preparation for year-end financial statement audit and prepare schedules for auditors.

Audit and analyze accounting systems and procedures to ensure compliance with accepted accounting standards and applicable laws, rules, and regulations.

Analyze, evaluate and organize data and information in preparation of complex studies such as financial forecasts and cost benefit analyses.

Answer public questions and provide information to the public; investigate customer 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 professional accounting practices, especially as applied to the public sector.

Principles and practices of accounting, budgeting, auditing, financial reporting and administration.

Principles and practices of supervision, training and performance evaluations.

Principles and practices of budget preparation and monitoring.

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

Ability to:

Organize, implement and direct accounting functions, purchasing and inventory for the District and to perform a variety of difficult and complex professional accounting tasks.

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.

Interpret and explain pertinent accounting and District practices and procedures.

Assist in the development and monitoring of assigned accounting function programs and District-wide budget.

Develop and recommend policies and procedures related to assigned operations, including implementation of efficient accounting procedures, and auditing and analysis of accounting systems and procedures.

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:

Seven years of increasingly responsible journey level accounting experience; including three years providing technical and functional supervision over assigned personnel.

Training:

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

License and Certificate

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

PHYSICAL REQUIREMENTS

Position requires prolonged sitting, standing, walking, reaching, twisting, turning, kneeling, bending, squatting, and stooping in the performance of daily activities. The position also requires grasping, repetitive hand movement and fine coordination in preparing statistical reports and data using a computer keyboard. Additionally, the position requires near vision in reading correspondence, statistical data and using a computer. Acute hearing is required when providing phone and personal service. The need to lift, drag, and push files, paper, and documents weighing up to 25 pounds also is required. Some of these requirements may be accommodated for otherwise qualified individuals requiring and requesting such accommodations.

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Employee Signature

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Supervisor Signature

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PALMDALE WATER DISTRICT

ACCOUNTS PAYABLE TECHNICIAN

FLSA Status: Non-Exempt

DEFINITION

To perform responsible clerical accounting work related to accounts payable and receivable functions; and to set up and maintain related records and files.

SUPERVISION RECEIVED AND EXERCISED

Receives immediate supervision from the Accounting Supervisor.

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

Perform accounts payable functions; create vendor accounts; process and code invoices for payment; review for completeness and accuracy; input information; prepare and mail various checks; and, track, post or reconcile expenditures.

Perform accounts receivable functions; receive payments and reconcile with statements or invoices for accuracy and additional charges relating to amounts due; and process related paperwork; post and update account information.

Verify stop payment orders on lost check payments; void out-of-date checks; match invoices and purchase orders to packing slips to ensure accuracy of payment; balance vendor statements; maintain and balance petty cash.

Prepare bills for field services provided by the District, collect data related to specific projects/jobs; check work order numbers used by field staff to verify labor, direct expenses and inventory used.

Perform a variety of clerical duties including typing, document scanning, filing, and mail distribution; prepare and distribute accounting reports as needed or according to periodic schedules.

Receive telephone calls from other departments or the public; answer questions and provide information accordingly.

Ensure that work is performed on a priority basis and is organized and completed in a timely manner; check documents and records for accuracy, completeness and conformance to applicable policies, rules and regulations.

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:

Advanced bookkeeping and financial record keeping methods and practices.

District policies and procedures related to financial services.

Modern office procedures and methods, including computer software related to accounting processes.

Ability to:

Perform responsible clerical accounts payable and receivable work.

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

Independently perform responsible clerical accounts payable and receivable work.

Use specialized accounting software.

Learn pertinent administrative and departmental policies.

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

Use word processing, spreadsheet, and database software applications.

Set up and maintain records and files; maintain logs and ledgers.

Prioritize work and meet required deadlines.

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:

Five years of clerical accounting experience is required.

Training:

Equivalent to high school diploma/GED.

License and Certificate

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

PHYSICAL REQUIREMENTS

Position requires prolonged sitting, standing, walking, reaching, twisting, turning, kneeling, bending, squatting, and stooping in the performance of daily activities. The position also requires grasping, repetitive hand movement and fine coordination in preparing statistical reports and data using a computer keyboard. Additionally, the position requires near vision in reading correspondence, statistical data and using a computer. Acute hearing is required when providing phone and personal service. The need to lift, drag, and push files, paper, and documents weighing up to 25 pounds also is required. Some of these requirements may be accommodated for otherwise qualified individuals requiring and requesting such accommodations.

Approved:

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

Employee Signature

Date

Supervisor Signature

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PALMDALE WATER DISTRICT

CUSTOMER ACCOUNT TECHNICIAN

FLSA Status: Non-Exempt

DEFINITION

To process customer billings; process customer payments; coordinate customer collections; and to perform varied and routine payroll and accounts payable 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, reminder and shut-off notices, 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.

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

Process rejected payments.

Coordinate and assist in payroll related functions and accounts payable functions as needed.

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.

Learn pertinent District and department policies.

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

Perform accounts payable functions, process and code invoices for payment, prepare and mail various checks.

Perform accounts receivable functions, receive payments and reconcile with statements or invoices for accuracy, process related paperwork, post and update account information.

Perform payroll functions, set-up and maintain employee records, process timesheets and related information, prepare checks and earnings statements, process CalPERS related data entry and postings when necessary.

Assist accounting supervisor with quarterly and annual balancing and tax filings when necessary.

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 experience performing accounting/clerical/billing/collection duties desirable.

Training:

Equivalent to high school diploma/GED. Additional specialized training in billing and accounting is desired.

License and Certificate

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

PHYSICAL REQUIREMENTS

Position requires prolonged sitting, standing, walking, reaching, twisting, turning, kneeling, bending, squatting, and stooping in the performance of daily activities. The position also requires grasping, repetitive hand movement and fine coordination in preparing statistical reports and data using a computer keyboard. Additionally, the position requires near vision in reading correspondence, statistical data and using a computer. Acute hearing is required when providing phone and personal service. The need to lift, drag, and push files, paper, and documents weighing up to 25 pounds also is required. Some of these requirements may be accommodated for otherwise qualified individuals requiring and requesting such accommodations.

Approved:

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

Employee Signature

Date

Supervisor Signature

Date

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PALMDALE WATER DISTRICT

CUSTOMER FINANCE SUPERVISOR

FLSA Status: Exempt

DEFINITION

To plan, organize, direct and supervise customer finance operations of the Finance Department, and to perform a variety of technical tasks relative to assigned area of responsibility.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the Finance Manager/CFO.

Exercises direct supervision over assigned Customer Account Technicians

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 finance operations; implement policies and procedures.

Plan, prioritize, assign, supervise and review the work of staff involved in customer finance operations including issuance of customer billings; receipt, posting and deposit of payments.

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 daily processing of customer on-line credit card and other payment methods, ensure proper documentation for deposit transactions; order currency.

Review and oversee Fin & Feather Club's contract compliance with District.

Ensure accurate billings are provided to customers on a regular and periodic basis; oversee collection activities for non-payment or late payments.

Ensure assigned staff comply with related District policies and procedures.

Investigate customer 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 utility accounting, billing, and record-keeping, including use of computerized systems.

Principles and practices of supervision, training and performance evaluations.

Principles and practices of water budget monitoring.

Basic accounting principles and practices related to water rates and fee structure.

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 finance 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.

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:

Seven years of increasingly responsible experience in customer finance, credit operations, or utility billing; including three years providing technical and functional supervision over assigned personnel.

Training:

Equivalent to associates degree in accounting, business, computer science, or related field or Bachelor of Science 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.

PHYSICAL REQUIREMENTS

Position requires prolonged sitting, standing, walking, reaching, twisting, turning, kneeling, bending, squatting, and stooping in the performance of daily activities. The position also requires grasping, repetitive hand movement and fine coordination in preparing statistical reports and data using a computer keyboard. Additionally, the position requires near vision in reading correspondence, statistical data and using a computer. Acute hearing is required when providing phone and personal service. The need to lift, drag, and push files, paper, and documents weighing up to 25 pounds also is required. Some of these requirements may be accommodated for otherwise qualified individuals requiring and requesting such accommodations.

Approved:

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

Employee Signature

Date

Supervisor Signature

Date

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PALMDALE WATER DISTRICT

FINANCE MANAGER/CFO

FLSA Status: Exempt

DEFINITION

To plan, organize, direct and review the activities and operations of the Finance Department (Finance and Customer Services divisions) including accounting, payroll, customer service, and field service operations 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 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 workflow; review and evaluate work products, methods and procedures.

Coordinate, supervise and oversee preparation of the District-wide annual budget; administrate and monitor the District-wide annual budget as adopted by the Board; direct the forecast of additional funds needed for staffing, equipment, materials, supplies, and services; monitor and approve expenditures; implement mid-year adjustments for the department.

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.

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:

Ten years of increasingly responsible experience in financial management, including five 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 or Certified Management Accountant from The Association of Accountants and Financial Professionals in Business highly desired.

PHYSICAL REQUIREMENTS

Position requires prolonged sitting, standing, walking, reaching, twisting, turning, kneeling, bending, squatting, and stooping in the performance of daily activities. The position also requires grasping, repetitive hand movement and fine coordination in preparing statistical reports and data using a computer keyboard. Additionally, the position requires near vision in reading correspondence, statistical data and using a computer. Acute hearing is required when providing phone and personal service. The need to lift, drag, and push files, paper, and documents weighing up to 25 pounds also is required. Some of these requirements may be accommodated for otherwise qualified individuals requiring and requesting such accommodations.

Approved:

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

Employee Signature

Date

Supervisor Signature

Date

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PALMDALE WATER DISTRICT

MANAGEMENT ANALYST - FINANCE

FLSA Status: Non-Exempt

DEFINITION

To perform technical level administrative and/or financial related duties in assistance to the Finance Department; to research, collect, and analyze data and prepare draft reports; to perform payroll related functions; to provide some highly responsible administrative duties in support of the Department heads and supervisors.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from Accounting Supervisor, may receive technical and functional supervision from Finance Manager/CFO.

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

Oversees and administers Payroll Processing (i.e. CelerTime); performing all payroll functions for the District including bi-weekly payroll processing, deductions, adjustments, levies & garnishments, analytical review, audit and reconciliation; maintaining all necessary back-up documentation for payroll transactions and communicating with local agencies to manage payroll deductions and payments.

Oversee the payment of all District payroll related tax and other related obligations providing necessary documentation; prepare/process and review all quarter and year end reporting (i.e. Federal and State payroll tax returns, CalPERS, and requested management reporting).

Oversees, updates, and develops necessary standard operating procedure (SOP) documentation for processes within the department. This will ensure that all regular tasks can be performed in the case of the primary individual not being available.

Establish and maintain a wide variety of filing and reporting systems as necessary; develop record keeping procedures; provide relevant information to relevant parties; prepare and type correspondence, and compile and type reports.

Assists with reconciliation of banking processes; and maintain and review detailed sub-ledgers such as capital improvement projects, accounts payable, accounts receivable, and customer deposits.

Assists with the general ledger in preparation for year-end financial statement audit and prepare schedules for auditors.

Assists the Accounting Supervisor in the preparation of the District's annual budget performing analysis and calculations necessary for completing all necessary projections and forecasting.

Assists with accounts payable functions, as needed.

Assists in performing year-end closing procedures including but not limited to the setup of project maintenance accounts for the new year, entering cost of living adjustments (if applicable), and various other tasks.

Independently respond to letters, electronic mail, and general correspondence based on areas of assignment.

May perform a wide variety of complex, responsible, secretarial, and administrative duties for executive staff and other management personnel; provide routine analytical support.

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 administrative and/or technical area to which assigned including, but not limited to, legislation, budget, and personnel.

Modern office equipment, procedures computer hardware, and software, including word processing, database, spreadsheet and accounting applications.

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

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

Techniques and principles of effective written and oral communication.

Pertinent local, State and Federal laws, codes, ordinances, District functions, policies, rules and regulations.

English usage, basic mathematical calculations and statistical methods.

Ability to:

Perform technical level administrative and/or program related duties.

On a continuous basis, know and understand all aspects of the job; intermittently review documents related to department operations; analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe, identify and problem solve office operations and procedures; understand, interpret and explain policies and procedures; explain operations and problem solve office issues for the public and with staff.

On a continuous basis, sit at desk for long periods of time; intermittently walk or stand in the field and sit while driving in vehicle or operating equipment; twist and reach office equipment; write and use keyboard to communicate through written means; perform simple grasping and fine manipulation; lift or carry weight up to 20 pounds.

Operate a personal computer utilizing spreadsheet, word processing and database software at an intermediate to advanced level.

Perform independent research in carrying out technical administrative and technical duties.

Collect, compile, analyze and present a variety of data in a meaningful way.

Review budget submissions and revisions for mathematical and accounting accuracy.

Understand District policies and practices to objectively analyze situations to determine proper course of action.

Understand and interpret complex policies, procedures, and regulations of outside agencies as necessary to assume assigned technical responsibilities.

Analyze situations quickly and objectively to determine proper course of action.

Compose professional quality correspondence; write highly detailed technical and analytical reports.

Maintain a high level of confidentiality of a wide range of sensitive information.

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

Communicate clearly and concisely, both orally and in writing.

Experience and Training

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

Experience:

Five years of responsible administrative support or technical experience preferably in the subject area to which assigned. One year of lead supervisory experience is highly desirable.

Education:

Associate degree from an accredited college with major course work in Public Administration, Business Administration, or a related field based on area of assignment desired or a Bachelor's Degree from an accredited college with a major in Public Administration, Business Administration, or a related field based on area of assignment.

Additional specialized training in payroll functions and compliance.

License and Certificate

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

May be required to obtain special certifications, depending on area of assignment.

PHYSICAL REQUIREMENTS

Intermittently, walk stand, kneel, climb, and bend in the field; sit while studying or preparing reports and driving in vehicle or operating equipment; 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 35 pounds. Additionally, the incumbent in this position works outdoors in all weather conditions, including wet, hot and cold with extreme sun exposure. Some of these requirements may be accommodated for otherwise qualified individuals requiring and requesting such accommodations.

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.

PALMDALE WATER DISTRICT

PURCHASING TECHNICIAN

FLSA Status: Non-Exempt

DEFINITION

To plan and organize the District's warehouse and service functions and functions associated with receiving, warehousing, and distribution of supplies, parts, and equipment; to establish and manage inventory control and warehousing systems; and to do related work as required.

Ensures that the District has or can get the materials necessary to keep the water system functioning properly. This position is also responsible for satisfying the supply needs of various District departments.

SUPERVISION RECEIVED AND EXERCISED

Receives supervision from the Accounting Supervisor.

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

Receiving Functions:

Receive materials and supplies at the District's warehouse; inspect shipments for damage and conformance to invoice and packing list; offload and store materials received using forklift or other equipment; return defective materials; notify and /or deliver to appropriate persons when shipments are received.

Establishes and oversees an inventory control system for materials, supplies, parts, all small equipment required for the efficient operation of the District.

Develops procedures for the requisition, acquisition, warehousing, and distribution of supplies and equipment.

Contacts vendors regarding prices, discounts, product availability, deliveries and product problems.

Issues and delivers materials, equipment and supplies.

Load, unload, assemble and deliver requested materials from warehouse to offices and job sites.

Maintains current information on trends and practices in public purchasing.

Maintains shipping/receiving and other records of materials in the warehouse and enter data into computerized inventory control data base as needed.

Assist in purchasing a variety of routine and non-routine items; contact vendors concerning price and availability of materials, parts, and equipment; solicit informal bids and quotes and select or recommend vendor selection; place approved orders with vendors.

Participate in all phases of District-wide activities and operations as assigned, including after-hours, on-call, and at other unusual times.

Assists other District personnel in all phases of activities and operations as needed, including after-hours, on-call, and at other unusual times.

Service and Warehouse Functions:

Plans and organizes the receiving, warehousing, and distribution of District supplies, parts, and equipment.

Plans, organizes, and documents all small meter, angle stop and meter box repair/replacement programs.

Establish and maintain proper inventory levels through use of a computerized inventory system which includes inventory related to emergency preparedness.

Reviews invoice of asphalt cuts, ensures accuracy, and submits for payment when completed.

Enters and updates material cost data and inventory levels onto computer.

Verify the accuracy of shipments, and report problems and discrepancies to District management.

Operates warehouse equipment in connection with the receipt, storage, and issue of materials.

Reviews requisitions and issue ordered materials.

Conducts periodic inventories of warehouse stock; including end-of-year inventory count and balancing to general ledger.

Operates a vehicle to pick-up items purchased and deliver materials and equipment to field personnel as requested.

Cleans and organizes the warehouse and facility yards, keeping all materials properly stored and organized for systematic distribution.

Assists in the repairs and maintenance of any and all aspects of the District's water distribution system as requested.

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.

Work outdoors in a variety of weather conditions.

MINIMUM QUALIFICATIONS

Knowledge of:

Principles, procedures, and practices related to the purchasing of materials and equipment for the District.

Proper methods for the development of specifications, preparation of bid packages, and securing proposal requests.

Inventory control and warehousing methods.

Methods used in receiving, inspecting, and storing materials and equipment.

Safety practices and regulations.

Ability to:

Organize, coordinate, and direct the receiving, storage, and distribution of merchandise, equipment, and other items.

Receive, inspect, and issue supplies and equipment.

Use computer systems and software applicable for the receiving, warehousing, inventory, and distribution of equipment and supplies.

Operate a computer terminal and computer keyboard with accuracy; and enter and retrieve information from a computerized inventory control system.

Use and operate computer and related office equipment.

Conduct physical inventories.

Operate District owned vehicles and warehouse equipment.

On a continuous basis, know and understand the operations; observe safety rules; intermittently, analyze problem equipment, identify and locate necessary parts and supplies; interpret work orders; remember location of parts; and explain operations to others.

Works in an environment with exposure to dust, dirt, and significant temperature changes between cold and heat.

Operate a variety of common hand and power tools and materials handling equipment, including a forklift.

May work outdoors in a variety of weather conditions; 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 with construction purchasing or project management. Experience in a water utility is highly desirable. Knowledge and ability to use Microsoft Word and Excel.

Training:

Equivalent to high school diploma/GED .

License and Certificate

Possession of, or ability to obtain, a valid Class "A" California Driver's License desirable.

Possession of a Distribution Operator Grade 2 Certificate as issued by the State Water Resources Control Board.

Possession of Certified Professional in Distribution and Warehousing desirable.

PHYSICAL REQUIREMENTS

Constantly, walk stand, kneel, climb, and bend in the field; sit while studying or preparing reports and driving in vehicle or operating equipment; 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. Additionally, the incumbent in this position works outdoors in all weather conditions, including wet, hot and cold with extreme sun exposure. Some of these requirements may be accommodated for otherwise qualified individuals requiring and requesting such accommodations.

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.