SOUTH COAST WATER DISTRICT

CUSTOMER SERVICE MANAGER

DEFINITION

This position is located within the Finance Department. As Customer Service Division Manager, the incumbent plans, organizes, directs, and coordinates the functions and activities of the Customer Service Division, including customer relations, enforcing and maintaining the District’s rules and regulations, service charge billings and collections, supervising and administering the District’s water turn-offs and disconnections, coordinating and overseeing the meter reading and upgrade program, and other customer service related functions; provides highly responsible and complex administrative and operational assistance to the Director of Finance and Manager; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

This position reports to the Director of Finance. The incumbent supervises staff within the Customer Service Division.

CLASS CHARACTERISTICS

This is a mid-management classification that manages District customer service activities, including water and sewer system billing, collection, account processing and record keeping, meter reading, and customer relations functions and activities. Responsibilities include performing diverse, specialized, and complex work involving significant accountability and decision-making responsibility. The incumbent organizes and oversees day-to-day activities and is responsible for providing professional-level support to the Director of Finance in a variety of areas. Successful performance of the work requires an extensive professional background as well as skill in coordinating division work.

The incumbent ensures that her/his activities are aligned with and support the South Coast Water District’s policies, mission, vision, core values, core strategies, and annual action items as well as performance measures.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS

Duties may include, but are not limited to, the following:

- Manages and participates in the development and implementation of goals, objectives, policies and priorities for the Customer Service Division; recommends within departmental policy, appropriate service and staffing levels; recommends and administers policies and procedures.
- Plans, manages, and oversees the daily functions, operations, and activities of the division, including development of user requirements, needs analysis, project scope, and the administration of comprehensive customer service, billing, and meter reading programs.
- Develops and standardizes procedures and methods to improve and continuously monitors and evaluates the efficiency and effectiveness of customer service programs, service delivery methods, and procedures; assesses and monitors workload, administrative and support systems, and internal reporting relationships; identifies opportunities for improvement and makes recommendations to the Director of Finance.
- Manages and coordinates the work plan for the assigned division; meets with staff to identify and resolve problems; assigns work activities, projects and programs; monitors work flow; reviews and evaluates work products, methods and procedures.
- Participates in the selection of personnel; trains, motivates, and evaluates assigned personnel; provides input on discipline and termination procedures, evaluates and reviews work for acceptability and conformance with division standards, including program and project priorities and performance evaluations; provides or coordinates staff training; works with employees to correct deficiencies; conducts quarterly performance and development sessions with each direct report.
 Performs complex and difficult customer support and special program work within programmatic and procedural guidelines.
 Oversees the billing process; ensures that data submitted and payments made are correct; audits meter readings, customer bills and payment entries for correctness; supervises cash handling and payment processing; evaluates the billing process and makes recommendations for changes and upgrades.
 Acts as the administrator and point of contact for the customer information systems; troubleshoots system errors and contacts vendors to resolve issues; trains new users on system processes and procedures; ensures system information is kept accurate and current; works with IT to ensure all information is safe and secure.
 Researches and audits a variety of reports, records and documents to reconcile billing or customer service issues; produces a variety of specialized reports.
 Seeks public input on proposed District projects and programs; works with employees District-wide to promote outstanding customer service; assists in the development of customer service literature, including brochures and billing inserts.
 Oversees District’s water metering function; manages and coordinates the meter upgrade project; ensures that meters are being inspected, maintained and repaired in a timely manner.
 Confers with and represents the department and the District in meetings with members of the Board of Directors, and a variety of public and private organizations.
 Participates in the development and administration of the Customer Service annual budget; directs the forecast of additional funds for staffing, equipment, materials and supplies; monitors and approves expenditures; directs and implements adjustments as necessary.
 Confers with other District departments, divisions and outside agencies; negotiates and resolves significant and controversial issues.
 Prepares and directs the preparation of a variety of written correspondence, reports, procedures, ordinances and other written materials.
 Maintains and directs the maintenance of working and official departmental files.
 Attends and participates in professional group meetings; stay abreast of new trends and innovations in the field of utility customer services and systems; research emerging products and enhancements and their applicability to District needs.
 Receives, investigates, and responds to problems and complaints in a professional manner; identifies and reports findings and takes necessary corrective action.
 Provides highly complex staff assistance to the Director of Finance; prepares and presents staff reports and other necessary correspondence.
 Manages and executes special projects as assigned.
 Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

 Administrative principles and practices, including goal setting and the development, analysis, and evaluation of programs, policies, and operational needs of the assigned division.
 Principles and practices of budget development, administration, and accountability.
 Principles and practices of employee supervision, either directly or through subordinate levels of supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures.
 Procedures, policies, rules and practices affecting the development, maintenance and control of fiscal and utility billing record keeping systems.
 Basic governmental accounting principles and procedures; and practices of financial and statistical record keeping, including automated accounting and bookkeeping systems.
 District and office policies, procedures and rules; general water and sanitary system ordinances, procedures and requirements.
 Information systems operations and concepts including billing application software.
 Practices of researching program issues, evaluating alternatives, making sound recommendations, and preparing and presenting effective solutions.
 Applicable Federal and State laws; District, department, and division regulations, codes, policies, and...
procedures.
- Modern office practices, methods, and computer equipment.
- Record keeping principles and procedures.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing the District in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
- Techniques for providing a high level of customer service to public and District staff, in person and over the telephone.

**Ability to:**

- Recommend and implement goals, objectives, and practices for providing effective and efficient customer service programs, billing systems, meter reading programs, and related services.
- Develop and implement goals, objectives, policies, procedures, work standards, and internal controls for the division.
- Train staff in work procedures; organize, assign, and evaluate the work of staff.
- Prepare and administer budgets; allocate limited resources in a cost effective manner.
- Provide staff support in complex, sensitive, or difficult customer service related assignments requiring a high level of independent judgment, strong analytical skills, and sophisticated knowledge of applicable laws, regulations, and contractual agreements.
- Supervise the collection, reporting and reconciliation of the District's daily cash receipts; perform a wide variety of record keeping and accounting work.
- Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.
- Interpret, explain, and ensure compliance with District policies and procedures, complex laws, codes, regulations and ordinances.
- Effectively represent the Department and the District in meetings with governmental agencies, community groups and various businesses, professional, and regulatory organizations and in meetings with individuals.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Make accurate arithmetic, financial, and statistical computations.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities and meet critical time deadlines.
- Operate modern office equipment including computer equipment, and administer and troubleshoot specialized software applications programs.
- Use English effectively to communicate in person, over the telephone and in writing.
- Use tact, initiative, prudence and independent judgment within general policy, procedural and legal guidelines.
- Establish and maintain effective working relationships with those contacted in the course of work.

**EXPERIENCE AND TRAINING GUIDELINES**

*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 (5) years of experience in customer service, business administration, finance, or a related field, including two (2) years of supervisory experience.

**Training:**

Equivalent to graduation from an accredited four-year college or university with major coursework in public administration, accounting, finance, or a related field.

**License or Certificate:**
Valid California class C driver’s license with satisfactory driving record.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various District and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter and retrieve data using a computer keyboard, typewriter keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects weighing up to 25 pounds.

**ENVIRONMENTAL ELEMENTS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

*The specific statements shown in each section of this classification description are not intended to be all-inclusive. They represent the essential functions and minimum qualifications necessary to successfully perform the assigned functions. Management reserves the right to add, modify, change or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*