

TO: BOARD OF DIRECTORS
FROM: MARIO IGLESIAS
GENERAL MANAGER
DATE: MAY 20, 2022

AGENDA ITEM
D-5
MAY 25, 2022

**CONSIDER CREATING A CUSTOMER SERVICE CLERK I/II/III SERIES
AND INCORPORATING CURRENT JOB DESCRIPTIONS INTO THE
NEWLY CREATED SERIES**

ITEM

Consider creating a Customer Service Clerk I/II/III series and incorporating current job positions into a newly created series. [RECOMMEND APPROVE NEWLY CREATED CUSTOMER SERVICE CLERK SERIES]

BACKGROUND

In an effort to reorganize duties to better fit our current business functions, it is proposed that the current Office Assistant and the two Customer Service Clerk positions be restructured into a series. The reorganization would allow the job title and duties to better support the District's constituents.

It is proposed that the job title for Customer Service Clerk and Office Assistant be changed to a series of Customer Service Clerk I/II/III to reflect the array of job responsibilities and provide cross-trained employees to increase employee sustainability.

Currently, the District has an Office Assistant and two Customer Service Clerks, one Customer Service Clerk position is currently vacant. If the reorganization were to be approved the current Office Assistant would be re-classed to Customer Service Clerk I. Then the position of Customer Service Clerk II position would be available for recruitment. Lastly, the current Customer Service Clerk would be re-classed to a Customer Service Clerk III.

FISCAL IMPACT

Positions are fully funded in the FY 22-23 budget. No new positions are being created.

RECOMMENDATION

Staff recommends that your Board approve the changes to the Job Titles and Job Descriptions.

ATTACHMENT

- A. Job Description for Customer Service Clerk Series (Proposed)
- B. Job Description for Office Assistant (Current)
- C. Job Description for Customer Service Clerk (Current)
- D. Districts Proposed Organizational Structure
- E. District Personnel Schedule

MAY 25, 2022

ITEM D-5

ATTACHMENT A

JOB DESCRIPTION NIPOMO COMMUNITY SERVICES DISTRICT

POSITION: Customer Service Clerk I/II/III

FLSA STATUS: Non-Exempt - Full Time (40 hour week)

REPORTS TO: Administrative Supervisor and/or Finance Director

1. DEFINITION AND SUMMARY OF DUTIES

Under direct or general supervision, performs a wide variety of customer service, clerical, utility billing, technical and accounting functions. This includes, but is not limited to, acts as receptionist answering phones, pick-ups and processing of mail and daily bank deposit, interacts frequently with the public daily, answers utility bill questions, prepares and processes utility billing and all related billing functions and duties, coordinates and integrates all District software tools and information technology, performs administrative duties as needed, including assisting with accounts payable, the preparation of the Board of Director packets, correspondence, prepares files and acts as custodian of records, maintains District web site and performs related work as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives direct or general supervision from the Administrative Supervisor or Finance Director. Customer Service Clerk I exercises no direct supervision. Customer Service Clerk II may exercise technical supervision over lower level staff. Customer Service Clerk III has responsibility to regularly lead in utility billing and administrative duties and exercises technical and functional supervision over Clerks I and II.

CLASS CHARACTERISTICS

Customer Service Clerk I This is the entry-level class in the Customer Service Clerk series. This class is distinguished from the Customer Service Clerk II by the performance of the more routine tasks and duties assigned to positions within the series including mail, bank deposit, filing, customer service account maintenance, receptionist duties, monitor supplies and order when needed, stock supplies, Board Room and Kitchen set up and maintenance, and Board packet preparation.

Customer Service Clerk II Employee(s) within this class are distinguished from the Customer Service Clerk I by the performance of the full range of duties assigned including utility billing preparation, and all related billing functions including customer account maintenance, processing of adjustments, door hangers, shut offs, process service orders, resolve customer concerns regarding their accounts, and prepare monthly billing related reports.

Customer Service Clerk III Employee(s) within this class are distinguished from the Customer Service Clerk I & II levels by possessing the skills needed to perform the most complex duties assigned and is/are cross-trained to perform the full range of duties in the series. Incumbent(s) perform complex, specialized duties related to metering and asset management of District facilities related to administrative services, exercising a high level of independent judgment and initiative. Incumbent(s) shall be responsible for overseeing and maintaining customer service software programs and their integration with other District software applications. Additionally, incumbent will gain proficiency in processing accounts payable and payroll preparation in the absence of the Administrative Supervisor and/or Finance Director. Employee(s) at this level is/are expected to work independently in performing the full range of duties outlined above with limited supervision.

Advancement/promotion to higher class is only possible if a position becomes available and employee satisfactorily performs duties in current class and meets qualifications of the class for which they are applying.

Approved by Board xxxxxx

**JOB DESCRIPTION
NIPOMO COMMUNITY SERVICES DISTRICT**

POSITION: Customer Service Clerk I/II/III

FLSA STATUS: Non-Exempt - Full Time (40 hour week)

REPORTS TO: Administrative Supervisor and/or Finance Director

2. ESSENTIAL DUTIES AND RESPONSIBILITIES

- a) Provide exemplary customer service to all individuals by demonstrating a willingness to be attentive, understanding and responsive, fair, courteous and respectful, and actively participate in maintaining a positive customer service environment at the counter and over the telephone.
- b) Be a team player in the organization.
- c) Prepare bank deposits and balance cash drawer daily
- d) Process standard reports to balance payments and other monies received, determine delinquencies, ensure customer name, address and other identifying information and other data related to the customer accounting process is correct and up to date.
- e) Process manual and automatic meter readings; runs billings on a monthly basis, prepares billings/late notices/discontinuance notices for mailing based on established deadlines.
- f) Receive and process payments; takes applications for new service; takes information and arranges for discontinuance or transfer of existing services; arranges for return of refunds/deposits; prepares payment extension agreements and leak adjustments for customers, prepares liens, and maintain records regarding payment status.
- g) Answer questions and receives complaints regarding water usage and/or quality telephonically and in person; generates service orders, if necessary, and follows up to ensure customer concerns have been addressed.
- h) Work cooperatively, and maintain effective working relationships with coworkers and provide back up support during staff absences to ensure all work is completed in a timely manner and office has adequate staff coverage.
- i) Process manual and automatic meter readings; runs billings on a monthly basis, prepare billings/late notices/discontinuance notices for mailing based on established deadlines.
- j) Prepare customer adjustments and supporting documentation for approval by the Administrative Supervisor or Finance Director.
- k) Prepare and reconciles ACH files and other electronic payments.
- l) Understand District Ordinances and policies and is be able to articulate them to the public in a clear and concise manner.
- m) Prepare and update daily, monthly and yearly reports including accounts receivable aging, consumption data, connection reports, discontinuance reports and other reports as required.
- n) Implement water and wastewater rate increases and other fee increases.
- o) Coordinate with the Engineering Department regarding meter installations, water/sewer inspections and other matters that directly affect customer utility billing.
- p) Maintain all automated and hard copy customer account information in a current status.
- q) Prepare a variety of correspondence, including, word processed or typed forms, memos, emails, procedures and other written materials.
- r) Maintain and updates training guides for cashiering, utility billing, and procedure guidelines and checklists to ensure standardization and consistency.
- s) Create, maintain, and utilize work order software and Automated Meter Reading software to coordinate tasks with Customer Service Specialist.
- t) Maintain District website
- u) Assist with coding and entering invoices into Accounts Payable module.

Approved by Board xxxxxx

**JOB DESCRIPTION
NIPOMO COMMUNITY SERVICES DISTRICT**

POSITION: Customer Service Clerk I/II/III

FLSA STATUS: Non-Exempt - Full Time (40 hour week)

REPORTS TO: Administrative Supervisor and/or Finance Director

- v) Perform a variety of general office support duties, as assigned
- w) Other organizational support duties, as assigned.
- x) May drive a motor vehicle to perform District duties.

3. QUALIFICATIONS

This position requires knowledge and proficiency in the following:

Customer Service Clerk I.

- a) Office procedures, methods and computer applications (Microsoft Outlook, Word and Excel).
- b) Standard office practices and procedures, including filing and the use of standard office equipment.
- c) Basic arithmetic. Basic accounting methods desirable.
- d) Correct business English, including spelling, grammar and punctuation.
- e) Ability to operate adding and calculating machines.

Customer Service Clerk II, in addition to the above:

- a) Office procedures, methods and computer applications (Microsoft Outlook, Word, Excel and PowerPoint).
- b) Arithmetic, bookkeeping principles, and accounting programs.
- c) Ability to understand the utility billing process in its entirety and complete these tasks in a timely manner
- d) Understand and process standard reports, tabulate data and summarize such information and preparation of periodic reports.
- e) Understand District Ordinances and policies and is able to articulate them to the public in a clear and concise manner.

Customer Service Clerk III, in addition to the above:

- a) Technical skills in computer software applications, including the ability to oversee automated meter reading software and its integration with utility billing software.
- b) Ability to oversee and support information technology and coordinate with vendors to assure proper functionality and alignment with NCSD policies and procedures.
- c) Ability to oversee NCSD website and assures functionality and alignment with NCSD policies and procedures.
- d) Knowledge in coding and processing Accounts Payable.
- e) Ability to perform project research and report preparation with minimal direction.
- f) Knowledge and ability to manage records retention and destruction.
- g) Knowledge of principles and practices of effective team building.

4. ESSENTIAL ABILITIES

- a) Performing standard office support work under minimum supervision.
- b) Performing customer accounting and billing system activities and performing customer accounting and record keeping with speed and accuracy.
- c) Receiving and accounting for payments and other money accurately.
- d) Filing with speed and accuracy.

Approved by Board xxxxxx

**JOB DESCRIPTION
NIPOMO COMMUNITY SERVICES DISTRICT**

POSITION: Customer Service Clerk I/II/III

FLSA STATUS: Non-Exempt - Full Time (40 hour week)

REPORTS TO: Administrative Supervisor and/or Finance Director

- e) Applying and explaining policies and procedures related to customer billing and customer service activities.
- f) Working effectively and cooperatively with a wide variety of customers and other individuals in person and over the telephone.
- g) Typing or word processing at a net rate of 40 words per minutes from standard copy.
- h) Using tact, discretion, and prudence in dealing with those contacted in the course of the work.
- i) Applying and explaining policies and procedures.
- j) Exercising sound independent judgment within established policy and procedural guidelines.
- k) Maintaining confidentiality of information where necessary.
- l) Ability to cope and maintain calm demeanor in a potentially stressful working environment.
- m) Establishing and maintaining effective working relationships with those contacted in the course of the work, including Board members, management team, co-workers, and members of the public.

5. PHYSICAL REQUIREMENTS

- a) Ability to read printed materials and a computer screen.
- b) Ability to type on a keyboard and use a mouse for extended periods of time.
- c) Ability to use computer software to access, record and convey information in required format.
- d) Ability to interact in person and on the telephone, relaying information verbally.
- e) Ability to communicate clearly, concisely and effectively, both orally and in writing.
- f) Ability to maintain, regular, predictable, punctual attendance.
- g) Mobility to work in a standard office environment and use standard office equipment.
- h) Ability to grasp, lift and move files, binders, boxes and other collections of documents (which can total up to 40 pounds).

6. EDUCATION AND EXPERIENCE

Customer Service Clerk I

Equivalent to graduation from high school or equivalent and two years of secretarial and/or general office experience and two years of increasingly responsible clerical accounting work.

Customer Service Clerk II

Associates Degree or equivalent college credits from an accredited college and three years of performing customer accounting or billing activities, preferable in a utility or similar setting.

Customer Service Clerk III

Associates Degree or equivalent college credits from an accredited college and five years of performing customer accounting or billing activities, preferably in a utility or similar setting and two years as a bookkeeper or equivalent position.

Approved by Board xxxxxx

**JOB DESCRIPTION
NIPOMO COMMUNITY SERVICES DISTRICT**

POSITION: Customer Service Clerk I/II/III

FLSA STATUS: Non-Exempt - Full Time (40 hour week)

REPORTS TO: Administrative Supervisor and/or Finance Director

7. LICENSES

- a) Possession of a Valid California Class C driver's license and a satisfactory driving record is desirable,
- b) Notary Public required, to be obtained prior to end of the Introductory Period.
- c) Must be bondable by District's fidelity bond insurer.

DRAFT

**JOB DESCRIPTION
NIPOMO COMMUNITY SERVICES DISTRICT**

POSITION:	Customer Service Clerk I/II/III
FLSA STATUS:	Non-Exempt - Full Time (40 hour week)
REPORTS TO:	Administrative Supervisor and/or Finance Director

ACKNOWLEDGEMENT:

By signing below, I acknowledge all of the following:

I have reviewed the above Job Description, and I understand it to be accurate and complete. I understand that management and/or the Board retains the right to assign me other tasks as necessary. I also understand that district management has the right to change this Job Description and my assigned job duties at any time.

If, at any time, I am unable to perform any of the assigned job duties or need any accommodation for medical reasons, I will alert the General Manager or his/her designee and will participate in an interactive process regarding possible workplace accommodations.

I understand that I am a non-exempt employee and that I can be required to work in excess of my normally assigned working hours, including being required to report to duty in cases of disaster response.

Employee's Name (print)

Employee's Name (signature)

Date

Approved by Board xxxxxx

MAY 25, 2022

ITEM D-5

ATTACHMENT B

**JOB DESCRIPTION
NIPOMO COMMUNITY SERVICES DISTRICT**

POSITION:	Office Assistant
FLSA STATUS:	Non-Exempt – Full Time (40 hour week)
REPORTS TO:	Administrative Supervisor

1. DEFINITION AND SUMMARY OF DUTIES

Under supervision of the Administrative Supervisor, provides varied office support for District staff and activities; answers the telephone; receives and provides information to District customers and the public; assists in all aspects of customer service related to utility billing, performs related work as assigned.

The employee is capable of independently performing the full-range of secretarial activities and providing full support to all of the Administrative Staff.

2. ESSENTIAL DUTIES AND RESPONSIBILITIES

- a) Acts as a receptionist: staffs the front desk and answers office telephone lines to receive and provide information to customers, visitors and the public; directs callers to the proper person, takes messages, explains District policies and procedures in resolving complaints.
- b) Receives payments over the counter; takes application for new service; takes information and arranges for discontinuance.
- c) Provides exemplary customer service to all individuals by demonstrating a willingness to be attentive, understanding and responsive, fair, courteous and respectful, and to actively participate in maintaining a positive customer service environment at the counter and over the telephone.
- d) Opens customer payments, processes payments received and posts payments to customer accounts.
- e) Works cooperatively and maintains effective working relationships with coworkers and provides back up support during staff absences to ensure all work is completed in a timely manner and office has adequate staff coverage.
- f) Prepares bank deposit and balances cash drawer on a daily basis.
- g) Be a team player in the organization.
- h) Opens, stamps and logs incoming mail; distributes as appropriate and obtains back up and other materials as required for processing.
- i) Assists with accounts payable preparation, including inputting invoices for payment and processing warrants for mailing to vendors and filing of invoices.
- j) Assists with the production/distribution of agenda packets and web site uploading of materials.
- k) Word processing a variety of correspondence, procedures, proposals, memos, forms and other written materials from drafts, prior information or brief notes; duplicates and distributes, as instructed.
- l) Maintains District forms, letterhead, hand-outs, brochures and other District literatures.
- m) Scans and files District information on a weekly basis, including maintaining chronological file and distribution of documents to appropriate staff.

Approved by Board April 14, 2021

JOB DESCRIPTION
NIPOMO COMMUNITY SERVICES DISTRICT

POSITION:	Office Assistant
FLSA STATUS:	Non-Exempt – Full Time (40 hour week)
REPORTS TO:	Administrative Supervisor

- n) Performs a variety of general secretarial office support work, takes minutes of staff meetings, arranges for meetings, conferences and seminar attendance, and maintains calendars of activities.
- o) Assists in the maintenance of District records in accordance with the District's Records Retention and Destruction Policy.
- p) Orders and distributes office supplies for Administration and Field Office.
- q) Maintains kitchen and board room, including set up and clean up.
- r) Participates in a variety of special projects, as assigned.
- s) Perform related duties and responsibilities, as assigned.
- t) Other organizational support duties, as assigned.
- u) May drive a motor vehicle to perform District duties.

3. QUALIFICATIONS

This position requires knowledge and proficiency in the following:

- a) Standard office practices and procedures, including filing and the use of standard office equipment.
- b) Microsoft Word, Excel and Outlook. Proficiency in these applications is required.
- c) Business letter writing and the standard format for correspondence and other materials.
- d) Record keeping principles and practices including electronic records creation and retrieval methods.
- e) Business arithmetic.
- f) Correct business English, including spelling, grammar and punctuation.
- g) Handling multiple tasks and meeting critical time deadlines.
- h) Techniques for dealing with the public, in person and over the telephone.
- i) Working command of Spanish language, written and verbal is desirable.

4. ESSENTIAL ABILITIES

- a) Performing detailed office and secretarial support work with minimal supervision.
- b) Composing correspondence and other written materials from notes or brief instructions.
- c) Entering numerical and other data into a computer with speed and accuracy.
- d) Ability to prioritize and handle multiple tasks and meeting critical time deadlines.
- e) Filing/scanning with speed and accuracy.
- f) Applying and explaining policies and procedures.
- g) Working effectively and cooperatively with a wide variety of customers and other individuals in person and over the telephone.
- h) Typing or word processing at a net rate of 40 words per minutes from standard copy.
- i) Exercising sound independent judgment within established policy and procedural guidelines.
- j) Maintaining confidentiality of information where necessary.

Approved by Board April 14, 2021

**JOB DESCRIPTION
NIPOMO COMMUNITY SERVICES DISTRICT**

POSITION:	Office Assistant
FLSA STATUS:	Non-Exempt – Full Time (40 hour week)
REPORTS TO:	Administrative Supervisor

- k) Ability to cope and maintain calm demeanor in a potentially stressful working environment.
- l) Add, subtract, multiply and divide, and calculate percentages, fractions, and decimals.
- m) Operate a motor vehicle safely.
- n) Communicate clearly and concisely, both orally and in writing.
- o) Follow written and oral directions.
- p) Performing detailed office support work with minimal supervision.
- q) Ability to prioritize and handle multiple tasks and meeting critical time deadlines.
- r) Applying and explaining policies and procedures.
- s) Using tact, discretion and prudence in dealing with those contacted in the course of the work.
- t) Establishing and maintaining effective working relationships with those contacted in the course of the work, including Board members, management team, co-workers, and members of the public.

5. PHYSICAL REQUIREMENTS

- a) Ability to read printed materials and a computer screen.
- b) Ability to type on a keyboard and use a mouse for extended periods of time.
- c) Ability to use computer software to access, record and convey information in required format.
- d) Ability to interact in person and on the telephone, relaying information verbally.
- e) Ability to communicate clearly, concisely and effectively, both orally and in writing.
- f) Ability to maintain, regular, predictable, punctual attendance.
- g) Mobility to work in a standard office environment and use standard office equipment.
- h) Ability to grasp, lift and move files, binders, boxes and other collections of documents (which can total up to 40 pounds).

6. EDUCATION AND EXPERIENCE

- a) Equivalent to graduation from high school or equivalent and two years of secretarial and/or general office experience and two years of increasingly responsible clerical accounting work.

7. LICENSES

- a) Possession of a valid California class C driver's license and a satisfactory driving record.
- b) Notary Public required, to be obtained prior to end of the Introductory Period.
- c) Must be bondable by the District's fidelity bond insurer.

**JOB DESCRIPTION
NIPOMO COMMUNITY SERVICES DISTRICT**

POSITION: Office Assistant

FLSA STATUS: Non-Exempt – Full Time (40 hour week)

REPORTS TO: Administrative Supervisor

ACKNOWLEDGEMENT:

By signing below, I acknowledge all of the following:

I have reviewed the above Job Description, and I understand it to be accurate and complete. I understand that management and/or the Board retains the right to assign me other tasks as necessary. I also understand that district management has the right to change this Job Description and my assigned job duties at any time.

If, at any time, I am unable to perform any of the assigned job duties or need any accommodation for medical reasons, I will alert the General Manager or his/her designee and will participate in an interactive process regarding possible workplace accommodations.

I understand that I am a non-exempt employee and that I can be required to work in excess of my normally assigned working hours, including being required to report to duty in cases of disaster response.

Employee's Name (print)

Employee's Name (signature)

Date

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Approved by Board April 14, 2021

MAY 25, 2022

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ATTACHMENT C

**JOB DESCRIPTION
NIPOMO COMMUNITY SERVICES DISTRICT**

POSITION: Customer Service Clerk

FLSA STATUS: Non-Exempt - Full Time (40 hour week)

REPORTS TO: Administrative Supervisor

1. DEFINITION AND SUMMARY OF DUTIES

Under direction of the Administrative Supervisor, performs a wide variety of duties in the processing and maintenance of the District's water and wastewater utility billing system including preparing utility billing, billing adjustments, late notices, door hangers, shut offs, monitor delinquent accounts, process service orders and other related utility billings functions. Interact with the coworkers, public, answer phone, takes payments over the counter and performs related work as assigned.

ESSENTIAL DUTIES AND RESPONSIBILITIES

- a) Processes manual and automatic meter readings; runs billings on a monthly and bi-monthly basis, prepares billings/late notices/discontinuance notices for mailing based on established deadlines.
- b) Receives and processes payments; takes applications for new service; takes information and arranges for discontinuance or transfer of existing services; arranges for return of refunds/deposits; prepares payment extension agreements and leak adjustments for customers, prepares liens, and maintain records regarding payment status.
- c) Provides exemplary customer service to all individuals by demonstrating a willingness to be attentive, understanding and responsive, fair, courteous and respectful, and to actively participate in maintaining a positive customer service environment at the counter and over the telephone.
- d) Answers questions and receives complaints regarding water usage and/or quality telephonically and in person; generates service orders, if necessary, and follows up to ensure customer concerns have been addressed.
- e) Works cooperatively and maintains effective working relationships with coworkers and provides back up support during staff absences to ensure all work is completed in a timely manner and office has adequate staff coverage.
- f) Assists with preparation of the bank deposits and may balance cash drawer, as needed.
- g) Be a team player in the organization.
- h) Processes standard reports to balance payments and other monies received, determine delinquencies, ensure customer name, address and other identifying information and other data related to the customer accounting process is correct and up to date.
- i) Processes manual and automatic meter readings; runs billings on a monthly and bi-monthly basis, prepares billings/late notices/discontinuance notices for mailing based on established deadlines.
- j) Prepares customer adjustments and supporting documentation for approval by the Administrative Supervisor or Finance Director.
- k) Prepares and reconciles ACH files and other electronic payments.
- l) Understands District Ordinances and policies and is be able to articulate them to the public in a clear and concise manner.
- m) Prepares and updates daily, monthly and yearly reports including accounts receivable aging, consumption data, connection reports, discontinuance reports and other reports as required.
- n) Implements water and wastewater rate increases and other fee increases.
- o) Coordinates with the Engineering Department regarding meter installations, water/sewer inspections and other matters that directly affect customer utility billing.

Approved by Board April 14, 2021

**JOB DESCRIPTION
NIPOMO COMMUNITY SERVICES DISTRICT**

POSITION: Customer Service Clerk

FLSA STATUS: Non-Exempt - Full Time (40 hour week)

REPORTS TO: Administrative Supervisor

- p) Maintains all automated and hard copy customer account information in a current status.
- q) Prepares a variety of correspondence, including, word processes or typed forms, memos, emails, procedures and other written materials.
- r) Maintains and updates training guides for cashiering, utility billing, and procedure guidelines and checklists to ensure standardization and consistency.
- s) Creates, maintains, and utilizes work order software to coordinate tasks with Customer Service Specialist.
- t) Performs a variety of general office support duties, as assigned
- u) Other organizational support duties, as assigned.
- v) May drive a motor vehicle to perform District duties.

2. QUALIFICATIONS

This position requires knowledge and proficiency in the following:

- a) Standard office practices and procedures, including filing and the use of standard office equipment.
- b) Microsoft Word, Excel and Outlook. Proficiency in these applications is required.
- c) Business letter writing and the standard format for correspondence and other materials.
- d) Record keeping principles and practices including electronic records creation and retrieval methods.
- e) Business arithmetic.
- f) Correct business English, including spelling, grammar and punctuation.
- g) Handling multiple tasks and meeting critical time deadlines.
- h) Techniques for dealing with the public, in person and over the telephone.
- i) Working command of Spanish language, written and verbal is desirable.

3. ESSENTIAL ABILITIES

- a) Performing standard office support work under minimum supervision.
- b) Performing customer accounting and billing system activities and performing customer accounting and record keeping with speed and accuracy.
- c) Receiving and accounting for payments and other money accurately.
- d) Filing with speed and accuracy.
- e) Applying and explaining policies and procedures related to customer billing and customer service activities.
- f) Working effectively and cooperatively with a wide variety of customers and other individuals in person and over the telephone.
- g) Typing or word processing at a net rate of 40 words per minutes from standard copy.
- h) Using tact, discretion, and prudence in dealing with those contacted in the course of the work.
- i) Applying and explaining policies and procedures.
- j) Exercising sound independent judgment within established policy and procedural guidelines.
- k) Maintaining confidentiality of information where necessary.
- l) Ability to cope and maintain calm demeanor in a potentially stressful working environment.

**JOB DESCRIPTION
NIPOMO COMMUNITY SERVICES DISTRICT**

POSITION: Customer Service Clerk

FLSA STATUS: Non-Exempt - Full Time (40 hour week)

REPORTS TO: Administrative Supervisor

- m) Establishing and maintaining effective working relationships with those contacted in the course of the work, including Board members, management team, co-workers, and members of the public.

4. PHYSICAL REQUIREMENTS

- a) Ability to read printed materials and a computer screen.
- b) Ability to type on a keyboard and use a mouse for extended periods of time.
- c) Ability to use computer software to access, record and convey information in required format.
- d) Ability to interact in person and on the telephone, relaying information verbally.
- e) Ability to communicate clearly, concisely and effectively, both orally and in writing.
- f) Ability to maintain, regular, predictable, punctual attendance.
- g) Mobility to work in a standard office environment and use standard office equipment.
- h) Ability to grasp, lift and move files, binders, boxes and other collections of documents (which can total up to 40 pounds).

5. EDUCATION AND EXPERIENCE

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:

Equivalent to graduation from high school. Knowledge of basic office procedures, office methods and computers. Knowledge of Microsoft Office, Word, Excel and/or PowerPoint is desirable.

Five years of performing customer accounting and billing activities, preferably in a utility or similar settings and two years as a bookkeeper or equivalent position.

6. LICENSES

- a) Possession of a Valid California Class C driver's license and a satisfactory driving record is desirable,
- b) Notary Public required, to be obtained prior to end of the Introductory Period.
- c) Must be bondable by District's fidelity bond insurer.

**JOB DESCRIPTION
NIPOMO COMMUNITY SERVICES DISTRICT**

POSITION: Customer Service Clerk

FLSA STATUS: Non-Exempt - Full Time (40 hour week)

REPORTS TO: Administrative Supervisor

ACKNOWLEDGEMENT:

By signing below, I acknowledge all of the following:

I have reviewed the above Job Description, and I understand it to be accurate and complete. I understand that management and/or the Board retains the right to assign me other tasks as necessary. I also understand that district management has the right to change this Job Description and my assigned job duties at any time.

If, at any time, I am unable to perform any of the assigned job duties or need any accommodation for medical reasons, I will alert the General Manager or his/her designee and will participate in an interactive process regarding possible workplace accommodations.

I understand that I am a non-exempt employee and that I can be required to work in excess of my normally assigned working hours, including being required to report to duty in cases of disaster response.

Employee's Name (print)

Employee's Name (signature)

Date

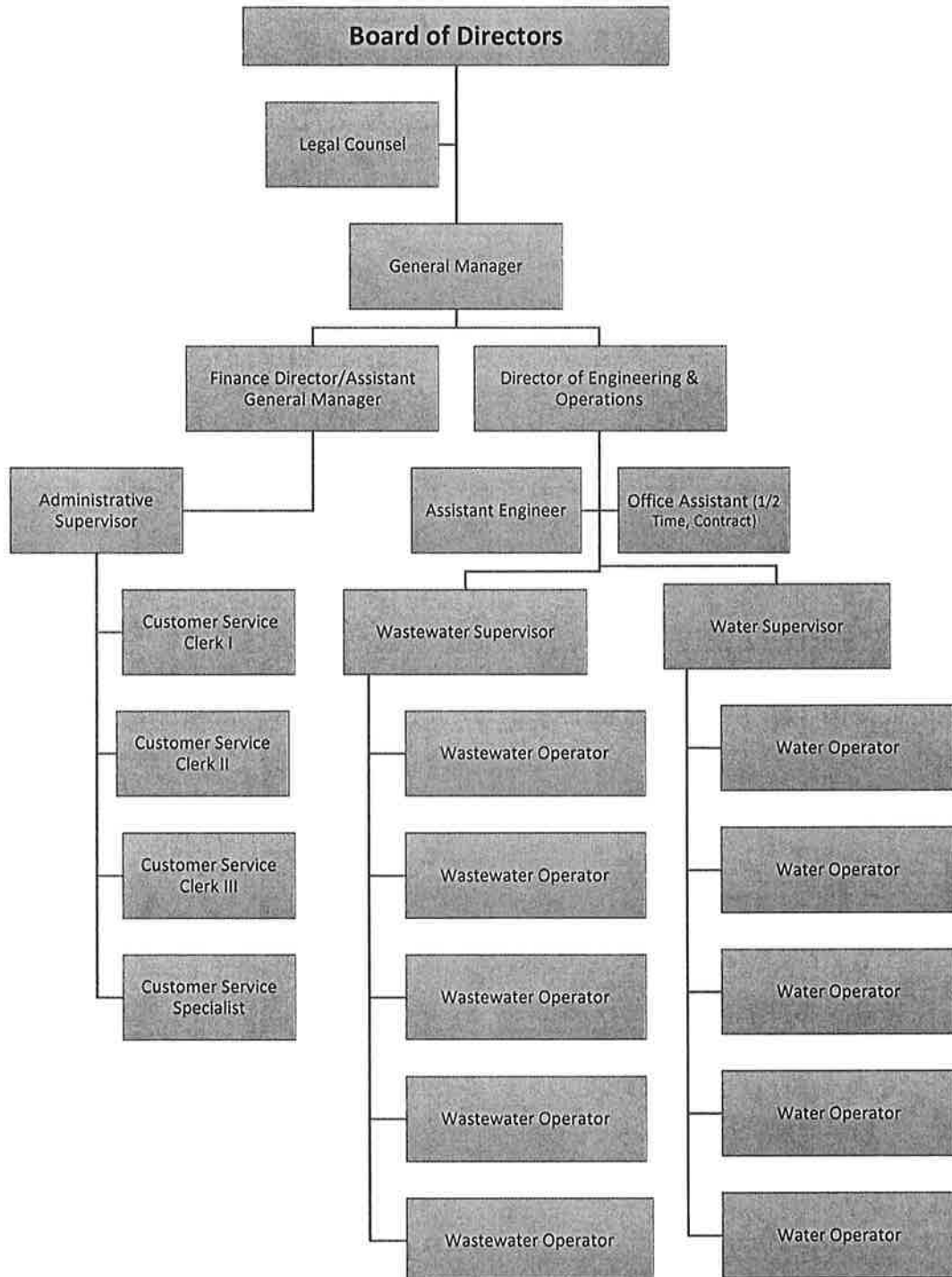
Approved by Board April 14, 2021

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ATTACHMENT D

NIPOMO COMMUNITY SERVICES DISTRICT
ORGANIZATIONAL STRUCTURE
2021-2022



MAY 25, 2022

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ATTACHMENT E


NIPOMO COMMUNITY SERVICES DISTRICT
DISTRICT PERSONNEL
2022-2023

ADMINISTRATION	MONTHLY SALARY STEP/RANGE (PAGE 11)	Budgeted FY 21-22	Additions 22-23	Budgeted 22-23
General Manager	Contract	1	0	1
Assist General Manager/Finance Director	44	1	0	1
Administrative Supervisor	31	1	0	1
Customer Service Specialist	17	1	0	1
Customer Service Clerk III	21	1	0	1
Customer Service Clerk II	13	1	0	1
Customer Service Clerk I	5	1	0	1
ADMINISTRATION SUBTOTAL		<u>7</u>	<u>0</u>	<u>7</u>

OPERATIONS				
Director of Engineering and Operations	60	1	0	1
Assistant Engineer	29	1	0	1
Water Supervisor	32	1	0	1
Wastewater Supervisor	38	1	0	1
Wastewater Operator III	24	0	0	0
Wastewater Operator II	20	3	0	3
Wastewater Operator I	16	2	0	2
Water Operator III	17	0	0	0
Water Operator II	13	1	0	1
Water Operator I	9	4	1	5
Utility Office Assistant	Contract	<u>0.5</u>	<u>0</u>	<u>0.5</u>
OPERATIONS SUBTOTAL		<u>14.5</u>	<u>1</u>	<u>15.5</u>

TOTAL		<u>21.5</u>	<u>1</u>	<u>22.5</u>
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TO: BOARD OF DIRECTORS

REVIEWED: MARIO IGLESIAS
GENERAL MANAGER 

FROM: PETER V. SEVCIK, P.E.
DIRECTOR OF
ENGINEERING & OPERATIONS

DATE: MAY 20, 2022

AGENDA ITEM
D-6
MAY 25, 2022

**AUTHORIZE TASK ORDER WITH MKN & ASSOCIATES
FOR WATER AND SEWER SERVICE PHASING STUDY
FOR DANA RESERVE ANNEXATION**

ITEM

Authorize Task Order for engineering services for the Dana Reserve Annexation Water and Sewer Service Phasing Study in the amount of \$78,599 with MKN & Associates [RECOMMEND BY MOTION AND ROLL CALL VOTE AUTHORIZE TASK ORDER WITH MKN & ASSOCIATES IN THE AMOUNT OF \$78,599].

BACKGROUND

The Nipomo Community Services District ("District") received an annexation application for the Dana Reserve Development ("Development") from NKT Nipomo Properties LLC ("Owner"), on June 24, 2020. The Owner wishes to annex a 288 acre parcel, currently located in the District's sphere of influence ("SOI"), into the District's service area. The District must complete a thorough evaluation of the anticipated impacts that the Development will have on the District's water and sewer enterprises.

At the July 8, 2020 Board meeting, the Board authorized the General Manager to enter into a deposit agreement to secure funding from the Owner to finance the cost of engineering, legal, financial, and administrative reports that evaluate the impact of the Development on the District. These reports are required in order to provide the District's Board of Directors with the information necessary for their understanding of the Development's impact on the District infrastructure.

At the August 26, 2020 Board meeting, the Board authorized the General Manager to issue a task order to MKN & Associates to evaluate the engineering aspects of providing water and wastewater service for the Development including:

- Evaluation of water supply, storage, and distribution facilities (offsite and onsite)
- Evaluation of wastewater collection facilities (offsite and onsite)
- Evaluation of Southland Wastewater Treatment Facility capacity

The evaluation was summarized in a final report (Dana Reserve Evaluation, 2022, MKN) that identified the water and sewer system improvements that will need to be constructed in order for the District to provide service for the Development as well as the planning level costs to construct the required improvements.

The next step is to develop a phasing plan for the construction of the required improvements to meet the developer's anticipated development program. District staff requested MKN submit a proposal to develop the phasing plan for the Development including the following tasks:

- Review phased development plan submitted by developer
- Identify water demand and wastewater flow anticipated for each phase, based on prior total projections developed in the Dana Reserve Evaluation
- Develop list of required improvements and capital budget for phased water and sewer system improvements to meet scheduled development program
- Prepare cashflow analysis and schedule for proposed offsite improvements to serve Dana Reserve
- Develop administrative draft, draft final, and final study

FISCAL IMPACT

The cost of MKN's work to prepare the Phasing Study will be paid for by the project's Owner.

STRATEGIC PLAN

Goal 1. WATER SUPPLIES. Actively plan to provide reliable water supply of sufficient quality and quantity to serve both current customers and those in the long-term future.

- B.1 Seek to have the County implement sustainable water supply policies that match the level of development they approve, including all the features described in the Water Resources Policy Statement.
- B.2 Engage with other local and regional organizations to develop solutions to long-term water supply challenges such as providing emergency backup supplies, and ensuring long-term water supply reliability, etc.

Goal 2. FACILITIES THAT ARE RELIABLE, ENVIRONMENTALLY SENSIBLE AND EFFICIENT. Plan, provide for and maintain District facilities and other physical assets to achieve reliable, environmentally sensible, and efficient District operations.

- B.1 NCSD shall maintain long-range infrastructure management, upgrade and replacement planning.

Goal 4. FINANCE. Maintain conservative, long-term financial management to minimize rate impacts on customers while meeting program financial needs.

- A.3 Develop a Near-, Mid-, and Long-Term Plan to Pay for Take-or-Pay Water. Evaluate potential and options for ramping rates over time compared to making rate jumps as the water becomes available.
- B.1 Evaluate, plan for and maintain finances that are adequate for all needs, stable, and reliable over the long-term.

RECOMMENDATION

Staff recommends that the Board authorize the General Manager to execute a Task Order in the amount of \$78,599 with MKN & Associates for engineering services for the Dana Reserve Development Water and Sewer Service Phasing Study.

ATTACHMENTS

- A. MKN Proposal dated April 21, 2022

MAY 25, 2022

ITEM D-6

ATTACHMENT A



MKN
PO Box 1604
Arroyo Grande, CA 93420

April 21, 2022

Peter Sevcik, PE
Director of Engineering and Operations
Nipomo Community Services District
(Submitted electronically)

RE: Water and Sewer Phasing Study for Dana Reserve Annexation

Dear Peter,

Thank you for the opportunity to continue working with Nipomo Community Services District (District) on utility planning related to the Dana Reserve Annexation. The attached proposal summarizes our approach and scope of work.

Project Background

MKN has been working with the District to identify potential water and sewer system impacts from extending service to the proposed Dana Reserve Annexation. In the Dana Reserve Development Water and Wastewater Service Evaluation (Dana Reserve Evaluation, 2022, MKN), water demands and wastewater flows were projected and compared to estimates provided by the developer. Capacities of water supply, distribution, storage, and wastewater collection and treatment systems were evaluated and compared to existing and future service area demands including Dana Reserve. Cost opinions were developed for buildout of the Dana Reserve development.

In order to refine the District's capital improvement plan, District staff requested MKN submit a proposal to develop phasing recommendations. If selected to perform this work, MKN will perform the following tasks:

- Review phased development plan submitted by developer;
- Identify water demand and wastewater flow anticipated for each phase, based on prior total projections developed in the Dana Reserve Evaluation;
- Develop recommended list of required improvements and capital budget for phased water and sewer system improvements to meet scheduled development program;
- Prepare cashflow analysis and schedule for proposed offsite improvements to serve Dana Reserve project; and
- Develop administrative draft, draft final, and final study.

Scope of Work

Task Group 1 – Project Management

Task 1.1 Project Management and QA/QC

Overall project management, which includes supervision of in-house staff, planning and monitoring of contract budget and schedule, and coordination with the District and MKN's project team will be



conducted by the MKN Project Manager. The Project Manager will provide a monthly status update with the invoice. MKN will provide senior technical review and implement our quality assurance and quality control (QA/QC) measures throughout the project.

Task 1.2 Meetings

MKN has included six (6) meetings as part of this scope of services. The following meetings are included:

1. Kick Off Meeting
2. Progress Meetings (2)
3. Administrative Draft Review Meeting
4. Draft Final Review Meeting
5. Preparation Meeting for Board Presentation

Task 1.3 Board Presentation

MKN will prepare a draft Powerpoint presentation for review by District staff. Key team members will attend the Board meeting and lead the presentation and respond to comments and questions from District.

Deliverables: Meeting Agendas/Meeting Minutes (5 total).

Task Group 2 – Analysis of Water System Improvements

MKN will perform the following tasks:

- Review proposed phasing plan from developer and use to develop annual water demand projections;
- Perform hydraulic model analysis to confirm initial phase of water system development is adequate to meet fire flow, emergency, and operational storage demands;
- Recommend phased system improvements (based on analysis in the Dana Reserve Evaluation) for each stage of proposed development; and
- Prepare draft schedule identifying design, bid-phase, and construction durations for each improvement.

Deliverables: Draft report section

Task Group 3 – Analysis of Wastewater System Improvements

MKN will perform the following tasks:

- Develop planning-level cost opinion for District lift station and force main at Dana Reserve;
- Review proposed phasing plan from developer and use to develop annual wastewater flow projections, including peak flows;
- Recommend phased system improvements at Southland Wastewater Treatment Facility (based on analysis in the Dana Reserve Evaluation) for each stage of proposed development; and
- Prepare draft schedule identifying design, bid-phase, and construction durations for each improvement.



Deliverables: Draft report section

Task Group 4 – Phasing Study Report

It is assumed District staff will provide comments on the draft sections submitted as Task Groups 2 and 3 are completed. A conclusions and recommendations section with summarized implementation schedule for major project phases and quarterly cashflow analysis will also be prepared for inclusion in the draft report.

An administrative draft report will be submitted after all the draft sections are reviewed and comments are received from District staff. Upon receiving comments on the administrative draft, a draft final report will be submitted for review. Final comments will be addressed in the final report.

Deliverables: Administrative Draft Report, Draft Report, Final Report

Fee Estimate

MKN proposes to complete this work on a time and materials basis with a budget not to exceed \$78,599, based on the 2022 MKN rate schedule. The estimated level of effort is provided as an attachment.

Schedule

MKN anticipates the following schedule for this project:

Activity	Schedule
Kickoff Meeting	Within 2 weeks of Notice to Proceed (NTP)
Draft Water System Section	Within 4 weeks of NTP
Draft Wastewater System Section	Within 6 weeks of NTP
Administrative Draft Final Report	Within 4 weeks of receiving comments from District on draft Water and Wastewater System Sections
Draft Final Report	Within 3 weeks of receiving comments on the administrative draft
Final Report	Within 3 weeks of receiving comments on the draft final report



We would like to express our thanks to the District for the opportunity to work on this important project. Should you have any questions or wish to discuss any of the information presented herein, please do not hesitate to contact me at your convenience.

Sincerely,

A handwritten signature in black ink that reads 'Michael K. Nunley'. The signature is written in a cursive, flowing style.

Michael K. Nunley, PE
CEO/ President

Attachments:

- Exhibit – Proposed Water and Sewer System Improvements
- Fee Schedule
- Level of Effort



2022 FEE SCHEDULE FOR
PROFESSIONAL SERVICES

ENGINEERS AND TECHNICAL SUPPORT STAFF

Engineering Technician	\$65/HR
Administrative Assistant	\$85/HR
CAD Technician I	\$115/HR
CAD Design Technician II	\$140/HR
Senior Designer	\$150/HR
Assistant Engineer I	\$125/HR
Assistant Engineer II	\$145/HR
GIS Specialist	\$150/HR
Planner	\$170/HR
Senior Planner	\$190/HR
Project Engineer I/ Senior Scientist	\$170/HR
Project Engineer II	\$180/HR
Senior Project Engineer I	\$190/HR
Senior Project Engineer II	\$195/HR
Project Manager	\$200/HR
Principal Engineer	\$205/HR
Project Director	\$235/HR

CONSTRUCTION MANAGEMENT SERVICES

Assistant Resident Engineer	\$171/HR
Resident Engineer Construction	\$187/HR
Inspector Construction	\$160/HR
Manager Principal	\$204/HR
Construction Manager	\$240/HR
Admin Asst.	\$65.00

Routine office expenses such as computer usage, software licenses and fees, telephone charges, office equipment and supplies, incidental postage, copying, and faxes are included as a 3% fee on labor cost.

The foregoing Billing Rate Schedule is effective through December 31, 2022 and will be adjusted each year after at a rate of 2 to 5%.

DIRECT PROJECT EXPENSES

Outside Reproduction	Cost + 10%
Subcontracted or Subconsultant Services	Cost + 10%
Travel & Subsistence (other than mileage)	Cost
Auto Mileage	Current IRS Rate - \$.58.5/mi.



	Project Director	Senior Planner	Assistant Engineer II	Administrative Assistant	Total Hours (MKN)	Labor (MKN)	ODCs (MKN)	Non-Labor Costs	Total Fee
Hourly Rates	235	190	145	85					
Task Group 1: Project Management and QA/QC									
Project Management	8			4	12	\$2,220	\$ 67	\$67	\$ 2,287
Monthly Reporting	6			6	12	\$1,920	\$ 58	\$58	\$ 1,978
QA/QC	16				16	\$3,760	\$ 113	\$113	\$ 3,873
Meetings (6)	12	12	12		36	\$6,840	\$ 205	\$205	\$ 7,045
Board Presentation	8	8	8		24	\$4,560	\$ 137	\$137	\$ 4,697
Subtotal	50	20	20	10	100	\$ 19,300	\$ 579	\$ 579	\$ 19,879
Task Group 2: Analysis of Water System Improvements									
Phased water demand projections	4	8	8	4	24	\$3,960	\$ 119	\$119	\$ 4,079
Hydraulic model analysis	4	8	8		20	\$3,620	\$ 109	\$109	\$ 3,729
Phased system improvements	4		16		20	\$3,260	\$ 98	\$98	\$ 3,358
Draft schedule	4		12		16	\$2,680	\$ 80	\$80	\$ 2,760
Draft report section	4	8	16		28	\$4,780	\$ 143	\$143	\$ 4,923
Subtotal	20	24	60	4	108	\$ 18,300	\$ 549	\$ 549	\$ 18,849
Task Group 3: Analysis of Wastewater System Improvements									
Wastewater flow projections and peak flows	4		16	2	22	\$3,430	\$ 103	\$103	\$ 3,533
Phased system improvements at Southland WWTF	4		16		20	\$3,260	\$ 98	\$98	\$ 3,358
Draft schedule	4		12		16	\$2,680	\$ 80	\$80	\$ 2,760
Draft report section	4		16		20	\$3,260	\$ 98	\$98	\$ 3,358
Subtotal	16	0	60	2	78	\$ 12,630	\$ 379	\$ 379	\$ 13,009
Task Group 4: Final Report									
Cashflow analysis	12		12	2	26	\$4,730	\$ 142	\$142	\$ 4,872
Draft Conclusions and Recommendations section	8		16	2	26	\$4,370	\$ 131	\$131	\$ 4,501
Administrative Draft Report	12		24	8	44	\$6,980	\$ 209	\$209	\$ 7,189
Draft Final Report	12		24	8	44	\$6,980	\$ 209	\$209	\$ 7,189
Final Report	4		12	4	20	\$3,020	\$ 91	\$91	\$ 3,111
Subtotal	48	0	88	24	160	\$ 26,080	\$ 782	\$ 782	\$ 26,862
TOTAL BUDGET	134	44	228	40	446	\$76,310	\$ 2,289	\$ 2,289	\$ 78,599