



**MEMORANDUM
HUMAN RESOURCES**

TO: Board of Supervisors
FROM: Lori Walsh, Human Resources Director
SUBJECT: Creation of Revenue Services Supervisor Classification

DATE: August 9, 2016

ACTION REQUESTED

Adopt an ordinance, introduced July 26, 2016, amending the un-codified Schedule of Classifications and Compensation Ordinance and the un-codified Allocation of Positions to Departments Ordinance related to the creation of the Revenue Services Supervisor classification.

Background

As a result of the meeting held July 11, 2016, the Civil Service Commission is recommending creation of the classified position of Revenue Services Supervisor in the Administrative Services Department.

Basis for Recommendation:

The Revenue Services Division of the Administrative Services Department has collected over 23 million dollars in revenue in each of the past two fiscal years. Over this fiscal year, that number has climbed to nearly 25 million dollars collected for the County. These revenues come from areas such as court fines and fees, franchise fees, Transient Occupancy Taxes (TOT), and previously uncollected County debt. According to the Administrative Services Department, there is potential for this number to grow even higher.

Recognizing this, and knowing that there have been advancements in technology as well as changes to internal workflows, the Administrative Services Department requested that Human Resources conduct a comprehensive analysis of the positions and classifications within the entire Revenue Services Division.

The creation of the Revenue Services Supervisor classification provides for a supervisory level classification between the management and advanced journey levels to alleviate a great deal of the day-to-day supervisory responsibilities from the Revenue Services Manager, which will in turn facilitate the ability of the manager to focus more on the managerial duties and functions of the position. As a first line supervisor, the incumbent in this new classification would exercise immediate supervision over staff from both the Accounting and Collections units, as well as the day-to-day supervision of the division, including the following:

- Planning, prioritizing, assigning, supervising and reviewing the work of staff involved in revenue services activities.

- Evaluating operations and activities of the work unit; recommending improvements and modifications; preparing various reports on operations and activities; and preparing and maintaining other reports and records.
- Participating in the selection of staff; supervising assigned Revenue Services staff; directing training and staff development in coordination with higher level staff; preparing first-line supervisory performance evaluations and overseeing preparation of line staff evaluations; recommending discipline; implementing discipline procedures as directed.
- Supervising training activities of assigned work unit or section; training lead staff; ensuring that new personnel are trained in the systems and procedures related to program functions including operation of systems used; troubleshooting problems and responding to questions and inquiries from other department staff.
- Assuring that subordinate staff understand and comply with all policies and procedures of the Revenue Services Division.
- Providing technical assistance on special projects for department and County management personnel.
- Researching and collecting data, and preparing statistical, technical and/or administrative reports as required; preparing written correspondence; participating in the preparation of procedural manuals for Revenue Services staff.
- Assisting staff with difficult situations, both on the phone and in person.
- Answering questions and providing information to the public; investigating complaints and recommending corrective action as necessary.
- Providing back-up support to the Revenue Services Manager as required.

FISCAL IMPACT

The cost of creating the Revenue Services Supervisor is approximately \$106,888 annually and will be considered with the Administrative Services Department's FY 2016-17 final budget.

Attachment 1 – Job Specification

Attachment 2 - Ordinance

Attachment 1

REVENUE SERVICES SUPERVISOR

DEFINITION

To plan, organize, direct, and supervise revenue services operations within the Administrative Services Department; to provide staff assistance to the Revenue Services Manager; and to perform a variety of technical tasks relative to assigned area of responsibility.

DISTINGUISHING CHARACTERISTICS

Positions at this level perform full, first-line supervisory responsibilities which include planning, assigning and evaluation of work of subordinates in the Revenue Services Division.

This class is distinguished from the Revenue Services Manager in that the latter provides full line and functional management responsibility for the entire Revenue Services function in Administrative Services, whereas this class is responsible for the day-to-day supervision of an assigned work unit within a department.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the Revenue Services Manager.

Exercises direct supervision over collections, accounting, and other assigned personnel.

EXAMPLES OF ESSENTIAL DUTIES – Essential duties may include, but are not limited to, the following:

Recommend and implement unit goals and objectives; establish schedules and methods for a collections center; draft for approval and implement policies and procedures.

Plan, prioritize, assign, supervise and review the work of staff involved in revenue services activities.

Evaluate operations and activities of the work unit; recommend improvements and modifications; prepare various reports on operations and activities; and prepare and maintain other reports and records.

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

Participate in the selection of staff; supervise assigned Revenue Services staff; direct training and staff development in coordination with higher level staff; prepare first line supervisory performance evaluations and oversee preparation of line staff evaluations; recommend discipline; implement discipline procedures as directed.

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Supervise training activities of assigned work unit or section; train lead staff; ensure that new personnel are trained in the systems and procedures related to program functions including operation of systems used; troubleshoot problems and respond to questions and inquiries from other department staff.

Analyze program problems and refer significant failures to the proper source of service; consult with vendors regarding program equipment and techniques; coordinate vendor purchases; assist in systems analysis and make recommendations for efficiency.

Assure that subordinate staff understand and comply with all policies and procedures of the Revenue Services Division.

Work with department personnel and the public in the areas of assigned functional responsibilities.

Provide technical assistance on special projects for department and County management personnel.

Represent the Revenue Services Division to outside agencies and organizations as directed by higher level management staff; participate in outside community and professional groups and committees; provide technical assistance as necessary.

Research, collect data, and prepare statistical, technical and/or administrative reports as required; prepare written correspondence; participate in the preparation of procedural manuals for Revenue Services staff.

Assist staff with difficult situations, both on the phone and in person.

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

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

Provide back-up support to the Revenue Services Manager as required.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

- Methods and techniques used for effective billing, collections and investigations for collection of current and delinquent accounts.
- Principles and practices of effective budgeting and personnel management.

- Equipment, tools and materials used in an automated collections center.
- Principles, practices and operating characteristics of manual and computerized call-taking systems in a collections environment.
- Computer software, including word processing, database, spreadsheet and other related applications.
- Principles of supervision, training and performance evaluation.
- Principles and practices of leadership, motivation, and conflict resolution.
- Principles and practices of work safety.
- Pertinent local, state and federal laws, ordinances and rules.
- English usage, spelling, punctuation and grammar; arithmetic and basic mathematical calculations.
- Principles and practices of customer service and public contact.

Ability to:

- Organize, implement and direct the operations and activities of the Revenue Services Division.
- Plan, assign, supervise, and evaluate the work of assigned staff.
- Develop and provide staff training as needed; prepare understandable and concise program documentation for staff training materials.
- Interpret and apply pertinent County and department policies, procedures, rules, and regulations.
- Assist in the development and monitoring of an assigned program budget.
- Draft and recommend policies and procedures related to assigned operations.
- Perform complex administrative work.
- Perform several tasks at once and assign reasonable priorities to each task.
- Maintain an efficient, calm demeanor in handling adverse situations.
- Operate all collections equipment and systems.
- Communicate clearly and concisely, both orally and in writing.
- Gain cooperation through discussion and persuasion.
- Work with various cultural and ethnic groups in a tactful and efficient manner.
- Establish and maintain effective working relationships with those contacted in the course of work.

- On a continuous basis, sit at desk/console for long periods of time. Intermittently twist and reach office equipment; walk to obtain printer materials from printer; write or use keyboard to communicate through written means; verbally give instructions to officers in the field; lift light weight.

Experience and Training

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

Experience:

Three years of increasingly responsible experience in accounts receivable or revenue billing with responsibilities for collecting delinquent accounts, including one year of lead or supervisory experience.

Training:

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

License or Certificate:

- May need to possess a valid driver's license as required by the position. Proof of adequate vehicle insurance and medical clearance may also be required.

Attachment 2

**Before the Board of Supervisors
County of Placer, State of California**

In the matter of: An ordinance amending the un-codified Schedule of Classifications and Compensation Ordinance and the un-codified Allocation of Positions to Departments Ordinance related to the Administrative Services Department.

Ordinance No.: _____

Introduced: _____

The following Ordinance was duly passed by the Board of Supervisors of the County of Placer at a regular meeting held _____, by the following vote on roll call:

Ayes:

Noes:

Absent:

Signed and approved by me after its passage.

Chair, Board of Supervisors

Attest:

Clerk of said Board

THE BOARD OF SUPERVISORS OF THE COUNTY OF PLACER, STATE OF CALIFORNIA, DOES HEREBY ORDAIN AS FOLLOWS:

The un-codified Schedule of Classifications and Compensation Ordinance and the un-codified Allocation of Positions to Departments Ordinance are hereby amended as follows: (Additions to ordinance shown in bold and underline, deletions shown with strike-through.)

Section 1. That the un-codified Schedule of Classifications and Compensation Ordinance is hereby amended to read as follows:

ADMIN CODE	CLASSIFICATION TITLE	SALARY PLAN — APPENDIX	GRADE
<u>11767</u>	<u>Revenue Services Supervisor</u>	GNRL	109

Section 2. That the un-codified Allocation of Positions to Departments Ordinance is hereby amended to read as follows:

ADMINISTRATIVE SERVICES			
	(a.) Administrative Services	<u>Revenue Services Supervisor</u>	<u>1</u>

Section 3. That this ordinance shall be effective the first day of the pay period following adoption.

Section 4. That this ordinance amendment is adopted as an un-codified ordinance.