



CITY OF LODI

COUNCIL COMMUNICATION

AGENDA TITLE: Reorganization of the Finance Department; Approve the Reorganization, Class Specifications and Salary Ranges

MEETING DATE: August 16, 2000

SUBMITTED BY: Finance Director

RECOMMENDED ACTION: That City Council approves the Reorganization of the Finance Department, the Class Specifications, and Salary Ranges

BACKGROUND INFORMATION: For several years the Finance Director has been looking at various reorganization options to address the following issues:

- More efficient customer service
- Cross training of staff
- Changes to workload and staff responsibilities over the years
- Proper alignment of staff

After years of reviewing input from finance and human resource department personnel and other NCPA cities, the attached reorganization plan is being recommended which will enhance the effort of the department with a minimum of monetary expenditure, and will accomplish the Finance Department's goal of improved customer service. The reorganization will not increase the number of budgeted positions within the department.

The reorganization will require the following position reallocation:

Reallocate two (2) Technical positions and one (1) Support Services Supervisor to Finance Tech

Position Title	Current no. of positions	Proposed no. of positions
Accounting Tech	2	0
Support Services Supervisor	1	0
Finance Tech	0	3

Human Resources conducted an audit of the Support Services Supervisor position and is recommending that position be reclassified to a technical position. Rather than have three separate technical classifications the recommendation is to reclass all three positions to Finance Tech.

APPROVED: _____

H. Dixon Flynn -- City Manager



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Reallocate one (1) Storekeeper/Buyer to Senior Storekeeper

Position Title	Current no. of positions	Proposed no. of positions
Storekeeper/Buyer	1	0
Senior Storekeeper	0	1

This is a title change to better reflect responsibilities.

Reallocate two (2) Account Clerk positions to Accounting Clerk I/II

Position Title	Current no. of positions	Proposed no. of positions
Account Clerk	2	0
Accounting Clerk I/II	0	2

Currently there is no distinction made between entry level and advanced level account clerks. With the addition of a Redevelopment Agency, numerous grants, and the implementation of the new financial software there is a greater distinction between responsibilities handled by the positions. The addition of the I/II levels is consistent with other positions in the City; i.e.: Police Clerk I/II/III.

The bulk of the reorganization impacts the "front office" staff members who are in direct and daily contact with the public. Currently there are three divisions of the Finance Department that are considered "front office" staff: Administration, Revenue and Field Services. Each of these divisions reports to a different supervisor according to the current organization chart. Due to the nature of the work they need to work closely together. The recommended reorganization would ensure consistency in training and direction with better customer service the ultimate goal.

From Administration Division:

One Finance Tech position responsible for utility bill collection arrangements would report to the Customer Services Supervisor. Currently this position reports to the Finance Director.

From Field Services Division:

Reallocate one (1) Customer Service Supervisor position to Field Services Supervisor

Reallocate one (1) Accounts Collector position to Field Services Representative

Reallocate two (2) Meter Reader positions to Field Services Representative

Position Title	Current no. of positions	Proposed no. of positions
Customer Service Supervisor	1	0
Field Services Supervisor	0	1
Accounts Collector	1	0
Meter Reader	2	0
Field Services Representative	0	3

APPROVED: _____

H. Dixon Flynn -- City Manager



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The Finance Director currently supervises the Customer Service Supervisor position. The reorganization would re-title this position to better reflect field responsibility and have this position supervised by the Customer Services and Revenue Manager. The Account Collector would be a title change to better reflect field responsibility. Two meter reader positions would be reclassified to Field Services Representative to allow for cross training, and distribution of more journey level workload. There would be no change to the remaining meter reader positions.

Revenue Division:

Reallocate one (1) Revenue Manager (mid-management) position to Customer Services and Revenue Manager

Reallocate one (1) Senior Account Clerk position to Customer Services Supervisor

Reallocate one (1) Senior Account Clerk position to Senior Customer Services Representative

Reallocate two (2) Account Clerk positions to Senior Customer Services Representative

Reallocate six (6) Account Clerk positions to Customer Services Representative I/II

Position Title	Current no. of positions	Proposed no. of positions
Revenue Manager	1	0
Customer Services & Revenue Manager	0	1
Senior Account Clerk	2	0
Customer Services Supervisor	0	1
Senior Customer Services Representative	0	3
Customer Services Representative I/II	0	6
Account Clerk	8	0

One of the major problems the department has had in the past is recruitment of people with customer service and cash handling/banking experience. The title Account Clerk gives one the impression they will be working with numbers not with heavy customer contact and cash. Changing the title to Customer Services Representative should make it easier to attract people with customer service qualifications. The addition of the I/II flex staffing levels is needed to distinguish between entry and journey level responsibilities. It will also ensure complete cross training of staff.

One Senior Account Clerk currently provides lead direction to the other nine staff members in the Revenue division. The department recommends this position be reallocated to Customer Services Supervisor. In addition it is recommended the second Senior Account Clerk position and two of the Account Clerk positions be reallocated to Senior Customer Services Representative as a more appropriate match for the duties which must be performed with the implementation of the new ECIS (utility billing) system and deregulation.

The salary recommendation and new new job specifications for the above employees are attached as part of the salary survey for the general services unit.

APPROVED: _____
H. Dixon Flynn -- City Manager



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The reorganization will result in the need to realign three mid-management position salaries due to internal alignment compaction and added levels of responsibility.

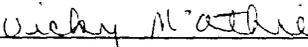
Position Title	Recommendation	Recommended E step
Accounting Manager	15% below Fin Dir control point	\$6,009
Customer Services & Revenue Manager	10% below Accounting Manager	\$5,463
Accountant II	No change	No change
Accountant I	10% below Accountant II	\$4,516

The Finance Director's number one objective is to find ways to enhance the department's level of customer service. While reviewing ways to accomplish this objective other issues such as problems recruiting people with customer service and cash handling background, cross training, increased levels of responsibility, distribution of workload, and more efficient alignment of staffing were discussed. The recommended reorganization addressing all these issues, and would be a win-win for everyone.

The recommended reorganization does not increase the current number of authorized positions.

FUNDING: The reorganization will result in an estimated \$24,000 annual increased cost. This cost will be absorbed within the department operating budget.

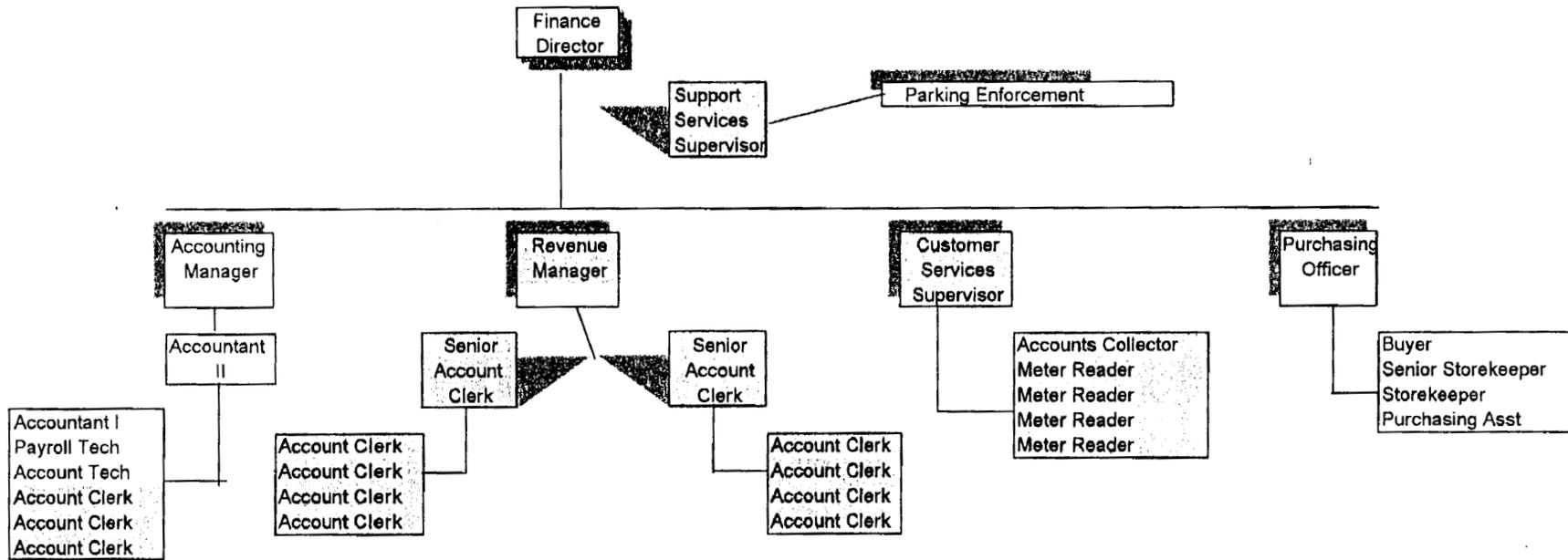
Respectfully submitted,


Vicky McAthie, Finance Director

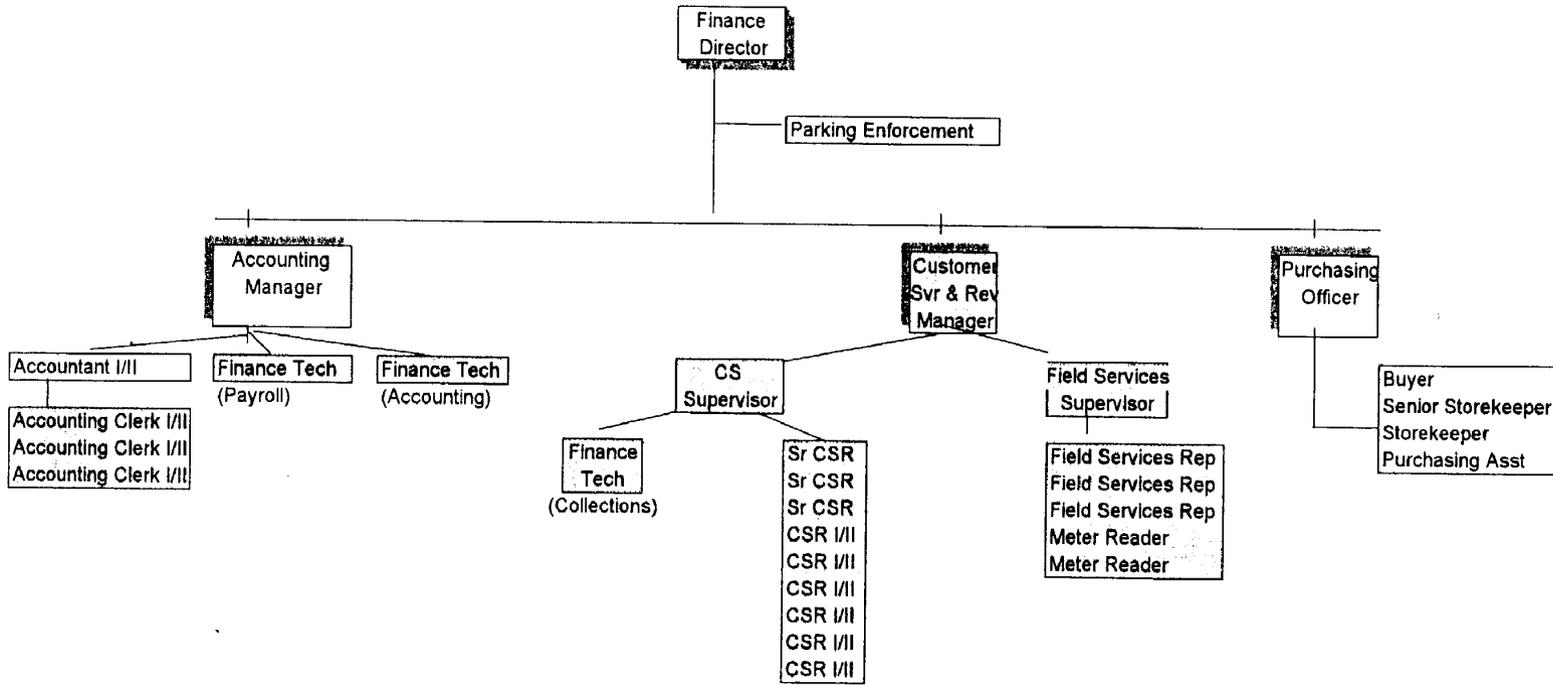
- Attachments
- Current Organization Chart
 - Proposed Organization Chart

APPROVED: _____
H. Dixon Flynn -- City Manager

Current Organization of Finance Department



Proposed Reorganization for Finance Department



Total Number of authorized positions does not change

Changes:

Current Title:	New Title:	Action:
Account Clerk	Accounting Clerk II	Flex staff classification
New Class	Accounting Clerk I	New class
Senior Account Clerk	Senior Customer Service Rep	Title change/New class
Accounting Tech	Finance Technician	Title change/New class
Support Services Supervisor	Finance Technician	Title change/New class
Revenue Manager	Customer Services & Revenue Manager	Title change
New Class	Customer Service Supervisor	New classification to reflect organizational change
New Class	Senior CSR	New classification to reflect split from Sr account clerk
New Class	CRS II	New classification to reflect split from account clerk
New Class	CRS I	New classification to reflect split from account clerk
Customer Service Supervisor	Field Services Supervisor	Title change
Account Collector	Field Services Rep	Title change
Meter Reader	No Change	
Parking Enforcement Assistant	No Change	
Buyer	No Change	
Storekeeper/Buyer	Senior Storekeeper	Title change
Storekeeper	No Change	
Purchasing Assistant	No Change	

RESOLUTION NO. 2000-153

A RESOLUTION OF THE LODI CITY COUNCIL APPROVING
REORGANIZATION OF THE FINANCE DEPARTMENT, AND
FURTHER APPROVING CLASS SPECIFICATIONS AND SALARY
RANGES

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WHEREAS, for several years the Finance Director has been looking at various reorganization options to address the following issues: more efficient customer service, cross-training staff, changes to workload and staff responsibilities and proper alignment of staff; and

WHEREAS, after reviewing input from the Finance Department, the Human Resource Department and other NCPA cities, a reorganization plan is being recommended which will enhance the effort of the Finance Department as below:

- 1) Reallocate two (2) Accounting Technician positions and one (1) Support Services Supervisor to Finance Tech; and
- 2) Reallocate one (1) Storekeeper/Buyer to Senior Storekeeper; and
- 3) Reallocate two (2) Account Clerk positions to Accounting Clerk I/II.

Field Services Division:

- 4) Reallocate one (1) Customer Service Supervisor position to Field Services Supervisor; and
- 5) Reallocate one (1) Accounts Collector position to Field Services Representative; and
- 6) Reallocate two (2) Meter Reader positions to Field Services Representative.

Revenue Division:

- 7) Reallocate one (1) Revenue Manager (Mid-Management) position to Customer Services and Revenue Manager; and
- 8) Reallocate one (1) Senior Account Clerk position to Customer Services Supervisor; and
- 9) Reallocate one (1) Senior Account Clerk position to Senior Customer Services Representative; and
- 10) Reallocate two (2) Account Clerk positions to Senior Customer Services Representative; and
- 11) Reallocate six (6) Account Clerk positions to Customer Services Representative I/II.

WHEREAS, the reorganization will result in the need to realign three Mid-Management position salaries due to internal alignment compaction and added levels of responsibility as follows:

<u>Position Title</u>	<u>Recommendation</u>	<u>Recommended E Step</u>
Accounting Manager Customer Services & Revenue Manager	15% below Finance Dir. Control point	\$6,009.00
Accountant II	10% below Accounting Manager	\$5,463.00
Accountant I	No Change	No Change
	10% below Accountant II	\$4,516.00

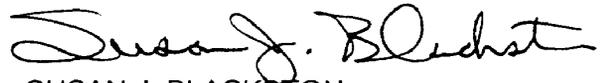
NOW, THEREFORE, BE IT RESOLVED that the Lodi City Council hereby approves the reorganization of the Lodi Finance Department, and further approves class specifications and salary ranges as set forth in the General Services salary survey (filed as attachments to Resolution No. 2000-152).

Dated: August 16, 2000

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I hereby certify that Resolution No. 2000-153 was passed and adopted by the City Council of the City of Lodi in a regular meeting held August 16, 2000, by the following vote:

- AYES: COUNCIL MEMBERS – Land, Nakanishi, Pennino and Mann
(Mayor)
- NOES: COUNCIL MEMBERS – Hitchcock
- ABSENT: COUNCIL MEMBERS – None
- ABSTAIN: COUNCIL MEMBERS – None


 SUSAN J. BLACKSTON
 City Clerk