

SEPTEMBER 21, 1983

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Council was apprised that Ralph Andersen and Associates had prepared an organizational report on the Finance Department indicating that the subject study was designed to provide better supervision in terms of work scheduling and monitoring of the field personnel, i.e., meter readers, parking enforcement assistants, and account collectors; reduce the span of control of the Assistant Finance Director

and to clarify lines of responsibility and authority of the Senior Accountant as it relates to the accounting function.

**REORGANIZATION OF
FINANCE DEPARTMENT
AND FIRE
DEPARTMENT**

In order to provide this needed supervision of field forces, a new position of Field Supervisor has been recommended, with Council being asked to adopt specifications for a Field Supervisor, to assign a salary range of \$1,579.05 to \$1,919.54, to designate this as a mid-management position, and to reclassify Mr. Emery Holloway to this position.

Following discussion with questions being directed to Staff, Council, on motion of Council Member Reid, Snider second, the heretofore set forth recommendations were adopted by unanimous vote of all Council Members present.

City wide safety program, and provide additional assistance in the area of fire inspection. It will ultimately result in transferring the dispatch function to the Police Department and reduce overall manning by two persons in the Fire Department.

In order to accomplish this, three new classifications are required: Fire Administrative Officer, Fire Shift Supervisor and Fire Inspector. Council is requested to approve the following specifications at the appropriate salary levels, designate the Fire Administrative Officer's position as mid-management and reclassify Mr. Stanley Rall and Mr. Raymond Schatz to those positions.

FIRE CAPTAIN	\$1,694.10 - \$2,059.19
FIRE INSPECTOR	\$1,463.43 - \$1,778.80
FIRE SHIFT SUPERVISOR	\$1,778.80 - \$2,162.15
FIRE ADMINISTRATIVE OFFICER	\$1,867.74 - \$2,270.27

Following discussion with questions being directed to Staff, Council, on motion of Mayor Pro Tempore Snider, Reid second, approved three new classifications for the Fire Department; namely, Fire Administrative Officer, Fire Shift Supervisor, and Fire Inspector. Further, Council approved specifications at the following salary levels, designated the Fire Administrative Officer's position as mid-management, and reclassified Mr. Stanley Rall and Mr. Raymond Schatz to those positions:

Fire Captain	\$1,694.10 - \$2,059.19
Fire Inspector	\$1,463.43 - \$1,778.80
Fire Shift Supervisor	\$1,778.80 - \$2,162.15
Fire Administrative Officer	\$1,867.74 - \$2,270.27

F O R W A R D

This report is based on a reorganizational study prepared by an ad hoc committee of firefighters, chaired by the Fire Chief. They are to be commended for the clarity in which they identified problems and proposing solutions to those problems. Without this valuable contribution, this report would have lacked the necessary insight needed to perform a proper organizational review.

OBJECTIVES

It is the objective of this report to present a clear and concise organizational plan for the Lodi Fire Department. This plan considers the parallel concerns of the Fire Department as an agency of the City and for the City of Lodi as a whole. The main objective is to create an organization that addresses administrative and fire ground concerns within the department, guided by reasonable fiscal restraints of the City budget.

BACKGROUND

In 1977, the Lodi Fire Department was authorized fifty-three positions. These fifty-three men manned three fire houses, operated three front line engine companies along with a service equipment truck and an eighty-five foot elevating platform. In addition to operating and maintaining this equipment, these men were responsible for reserve equipment, utility vehicles, and radio communications.

In the fiscal year beginning July 1978, the authorized personnel was reduced by one man. In 1979, a second position was eliminated and in 1980, another position was removed from the authorized personnel. Since 1980, Lodi Fire Department has been authorized fifty personnel, comprising of Fire Chief, Assistant Fire Chief, Chief Fire Inspector, Training Officer, nine Fire Captains, eighteen Fire Engineers, eighteen Firefighters, and one Dispatcher Clerk.

In December 1980, Chief Don Cockayne retired from the department. The Chief's position was filled by Assistant Chief Don MacLeod.

To this date, the Assistant Chief's position has not been filled and those duties have been assumed by the remaining three Chief Officers. As a matter of fact, that position was removed in the 1983-84 budget with the assurance an organizational study would be submitted during the budget hearings.

Proposals for the reorganization of the Lodi Fire Department originated in late 1980. Different proposals have been submitted and reviewed since that time. Of these plans, none have been implemented at this time.

CURRENT OPERATIONS AND DEFICIENCIES

The structure within a fire department can be very complex. For the sake of simplification, the operations of the Fire Department can be divided into four areas: Fire Administration, Fire Suppression, Fire Prevention, and Fire Training.

Fire Suppression

The objectives of the fire suppression force is to orderly and systematically control and extinguish fires in order to prevent loss of life and damage to property. Fire suppression activities are provided by three engine companies augmented by two truck companies. The

suppression forces are housed in three stations throughout the City and work a twenty-four hour shift. The fire command structure is achieved by having the chief officers rotate stand-by duty. The duty officer is responsible for response to fire emergencies. This stand-by duty is performed in addition to normal working days, amounting to approximately 1600 hours a year per man. This stand-by duty requires the officer to remain within the city limits in an on-call mode.

On fires of limited magnitude, this operating procedure produces few problems. However, problems in fire suppression activities occur during larger fires. The present operating tendency at a fire of great magnitude is that the first company officer gives a quick report of the incident and implements his plan of attack. The following arriving units also size-up the situation and implement their plan of attack. The chief officer is notified by dispatch of the emergency. His objective during a major fire is to respond and develop a command structure. This does not occur until ten to fifteen minutes into the fire and after all responding emergency vehicles are at the scene and working. This has, on numerous occasions, resulted in engine companies operating as independent, uncoordinated units, with neither company's activities supporting each other.

The fact that major fires rarely occur is not the justification for disregarding a fire command system. The fact that a major fire is likely to occur and that a major fire presents the greatest risk to life and limb experienced in a firefighter's job, is justification that an organization should be prepared and thoroughly trained in a command system.

Fire suppression activities can best be improved by providing an individual to immediately respond to emergencies to fulfill fire command responsibilities. In addition, improvement of suppression activities can be aided by reviewing current operating procedures and by thorough training of suppression forces in fire ground command systems.

Fire Prevention

The Bureau of Fire Prevention has a primary responsibility for fire code enforcement. This fire code enforcement is accomplished through on-site inspection of facilities and construction plan reviews in the Fire Prevention Office.

On-site facility inspections of commercial buildings are accomplished by engine companies. These inspections, which are referred to as company level inspections, are performed on a scheduled basis. The engine company will

visit each site on an initial inspection, followed by two call-back inspections for compliance. If compliance has not occurred by the third visit, the inspection report is forwarded to the Fire Prevention Office for follow-up inspections.

In addition to follow-up of company level inspections, the Fire Prevention Bureau is responsible for on-site inspections of hospitals, convalescent hospitals, schools, family care and child care homes, inspections involving flammable liquid storage and public assembly buildings. These inspections are normally completed by the Chief Fire Inspector, in addition to construction plan reviews.

Due to an increased number of company level inspections being forwarded to the Fire Prevention Bureau, it has become necessary to augment the Chief Fire Inspector with additional assistance. This augmentation occurs by assigning one individual per shift to the Fire Prevention Bureau on special assignment. This individual is released from non-emergency activities, excluding training, to perform duties in the Fire Prevention Bureau.

The use of line personnel is not without problems. Planned use of the men and scheduling of inspection appointments with the public is difficult. The problems incurred with the use of line personnel are a result of

the normal span of days off between working tours, time off for vacation and holidays, absence for training periods, fire suppression and other unexpected incidents. These occurrences have at times severely limited the use of line personnel to two hours or less per day.

Recent State-mandated inspections and fire code enforcement have greatly increased the area of required inspections. Three examples of current legislation mandating the increased work load are: Semi-annual inspections of fire sprinkler systems. At present, 85 exist within the City. Second, semi-annual inspections of hood and duct automatic fire extinguishing systems, of which 71 exist. Third, legislation affecting hotels and motels. This legislation mandates fire inspections, posting of violations, publication and enforcement of fire code requirements.

These recently mandated inspections will require additional man hours in order to be completed. Additional assistance in the bureau will be necessary to meet these ever increasing demands.

Fire Training

The fire training division has a primary job of surveying the need, developing programs, and conducting training classes. Fire Service personnel receive their

training and education in many ways and from many sources. The basic transfer of skills as well as the maintenance of these skills occurs at drills. A drill can be defined as a planned, organized practice session, conducted by the local officer, covering a single, specific topic. It usually takes place in or near the individual fire station and involves small groups.

Drills can be contrasted with formal training sessions, which are structured planned classes conducted by an individual skilled in the educational process. Training classes are usually conducted at a central location and cover an entire subject area. Subjects which are covered under the heading of training sessions would include recruit firefighting, an elevated stream operation, and pump operations.

The basic difference between drills and training are that drills reinforce training which has already occurred, while training provides the specific skill level needed on the job.

Obviously, one of the most important keys to a successful fire service is the level and type of training given. A training program requires the identification of needs, curriculum development, delivery, measurement and evaluation. The purpose of training is to prepare fire personnel to respond in a manner that would effectively

reduce the emergency. Through training, fire losses can be reduced, property conservation increased, and the hazards to civilians and firefighters identified.

Another key to a successful fire service training program is the need to assure that drills are conducted in the same manner. It is vital that each person know what and how others are going to perform.

Fire Administration

Presently, the Fire Chief and the Training Officer are performing the administrative duties of the Fire Department. These duties include, but are not limited to, budget preparation and monitoring, purchasing, personnel records and problems, equipment maintenance program and records, collection and review of fire reports, hose and hydrant maintenance and records, in addition to the normal everyday staff responsibilities.

In addition to the Chief Officer responsibilities, the overloading of the position responsibilities has resulted in decreased efficiency. In order to increase efficiency, one of two choices are available. The choices are the elimination of duties or the shifting of responsibility for completion of the duties. Because the previously-described duties are necessary to the department, the elimination of the duties would only

result in regression of the department. The remaining choice is to allow the performance of these duties to be done by someone other than the Fire Chief and Training Officer. This action will increase efficiency within the department.

OTHER RELATED NEEDS AND REQUIREMENTS

Fire Dispatch

The Lodi Fire Department now has one Dispatcher on a 40-hour week, working 8:00 A.M. to 5:00 P.M., Monday through Friday. Relief for vacations, holidays, illness, time not worked, and personal relief is provided by a front line firefighter. This arrangement presents few administrative problems, however, the cost for relief and night coverage requires an additional full time firefighter.

We budget 15 persons per day for fire suppression. The minimum requirement for adequate response is 12. In order to provide vacation and holiday relief, 2 people of the 15 may be scheduled off at any one time. The 15th person is used to provide dispatch services when the Dispatcher-Clerk Fire is not available. The bottom line of this arrangement is that the City is using firefighters to function as dispatcher. The Police dispatch center is

equipped to dispatch on both police and fire frequencies. The Police dispatchers are trained to handle emergencies, are presently scheduled 24 hours per day, and there are normally two dispatchers on duty at any one time.

City-wide Safety Program

The City has had an informal safety policy delegating responsibility to the department heads; however, there is no system to coordinate the activities of all the departments, to assess the cost effectiveness of the safety activities, and to keep up to date and appraise employees and management of safety issues.

This function is too important to continue on an ad-hoc basis. Barbara Akk has recommended we increase our safety consciousness and give it "command" attention. We also have agreed with our employees to undertake a more comprehensive City-wide safety program.

This function should be delegated to a person who has some background in maintaining equipment and work place in a safe condition, some supervisory experience and an awareness of the tangible and intangible results of accidents.

RECOMMENDATIONS

After review of the current operations, the problems become apparent and their effect on the department is severe. It is well known that problems are plentiful and solutions are few, but as stated before, the objective was to create an organization that addressed administrative and fire ground concerns within the department, guided by reasonable fiscal restraints of the City budget.

To meet this objective, an organization needs to be developed that can eliminate or limit the negative impact of conditions with the Department. The reorganization of the Lodi Fire Department must be structured to permit the following:

1. Redistribution of staff functions to levels that would avoid overloading.
2. Elimination of excessive and restrictive stand-by duty for Chief Officers.
3. Availability of fire ground commanders that can respond immediately in the event of an emergency.
4. Additional assistance in the fire prevention bureau to complete mandated inspections.

5. Support for a training program, with an individual given sufficient time to prepare and deliver material.

This report answers these organizational needs with recommendations as follows:

1. Eliminate the positions of Assistant Fire Chief, Fire Training Officer and Chief Fire Inspector and create three positions of Fire Administrative Officer.
2. Reduction from eighteen firefighters to fifteen firefighters.
3. Authorization of three Shift Supervisor positions working twenty-four hour shifts.
4. Authorization of a Fire Prevention Inspector position working forty hours a week.
5. Consolidation of Police and Fire Dispatch.

The positions of Administrative Fire Officers gives the Chief flexibility in assignment and does not create an "heir apparent" as the three Chief Officers would all be the same rank and classification.

By the same token, it will provide the organization with the functional division heads - Administration, Fire Prevention and Training - that are needed to maintain maximum efficiency. The Administrative Fire Officers would also spend along with the Fire Chief a "duty-day" and be available to respond to major fires as the Chief Officer to assume the fire ground command.

The final benefit will be that the officer assigned to Administration will also be able to assume the overall responsibility for a City-wide safety program.

Rotation of assignments may or may not occur, depending upon the Fire Chief's desires. The availability to expose and train Chief Officers to staff responsibilities is another benefit to the City. These Officers are the key to improved line functions and redistribution of staff responsibilities, not to mention the elimination of excessive stand-by duty.

The increasing workload in the Fire Prevention Office can be handled by placing an individual in the bureau, working a forty-hour week. This second person in the bureau would allow greater continuity in inspections, plan checks and arson investigations. Proper scheduling of time off for vacations would allow the minimum of one man in the bureau at all times for the detailed fire code interpretation and enforcement.

Consolidation of Police and Fire Dispatch Centers would only enhance the benefits of this recommended organizational structure. It should be mentioned that when "911" is implemented, the emergency dispatch centers will be consolidated anyway. Further benefits occur by reclassifying the Fire Dispatcher-Clerk to a Clerk Typist and adjusting the salary schedule.

The authorization of three Shift Supervisor positions would provide 24-hour supervision of line personnel. At the present time, no one individual is wholly responsible for shift activities. These Supervisors would provide the needed direction and coordination of suppression forces in emergency activities by permitting individuals to respond immediately to an emergency and assume fireground command responsibilities. This immediate assumption of command would allow the Shift Supervisor to orchestrate responding engine companies on assignments that would reduce the emergency. In addition, the Shift Supervisor would assume responsibility for day-to-day non-emergency activities and requirements of line personnel.

EFFECT ON CITY BUDGET

A cost analysis is included based on the assumption that the three new Administrative Officers would receive a salary at the same scale of the Chief Fire Inspector. This assumption is based on the idea that all Administrative Officers are of equal position with the only difference being in assignments. The cost study compares the fifty authorized personnel to full implementation of recommendations. Estimated savings to the City in salary and benefits, excluding vacation and holidays, is approximately \$56,000 a year.

Base Organization

1 Fire Chief	\$3,310	\$ 3,310
1 Ass't Fire Chief	2,384	2,384
1 Chief Fire Inspector	2,270	2,270
1 Fire Training Officer	2,162	2,162
9 Fire Captains	2,059	18,531
18 Fire Engineers	1,779	32,022
18 Firefighters	1,694	30,492
1 Dispatcher-Clerk (Fire)	1,413	1,413

50 \$92,584

Proposed Organization

1 Fire Chief	\$3,310	\$ 3,310
3 Fire Adm. Officers	2,270	6,810
3 Shift Supervisors	2,161	6,486
6 Captains	2,059	12,354
18 Fire Engineers	1,779	32,022
15 Firefighters	1,694	25,410
1 Fire Inspector	1,779	1,779
1 Typist-Clerk II	1,165	1,165

48 \$89,336

Pension	\$ 1,413 @ 24.256%	343
Pension	91,171 @ 34.727%	31,661
Uniform Allowance	49 @ \$23	1,127
Medical	49 @ \$124.74	6,112
	1 @ 105.80	106
Dental	1 @ 27.60	28
	3 @ 18.78	56
	45 @ 17.21	774
	1 @ 10.00	10
Deferred Comp		<u>95</u>

Monthly Cost \$132,896

	\$ 1,165 @ 24.256	283
	88,171 @ 34.727%	30,619
	47 @ \$23	1,081
	47 @ \$124.74	5,863
	1 @ 105.80	106
	1 @ 27.60	28
	3 @ 18.78	56
	43 @ 17.21	740
	1 @ 10.00	10
		<u>90</u>

\$128,212

\$132,896
128,212

\$ 4,684 X 12 = \$56,208 per year

SUMMARY

The plan presented in this report provides solutions for the problems in the Fire Department today. If implemented, this plan will increase productivity, provide an organization that can deal with an emergency in a controlled and monitored fashion, recognize the need for more emphasis on fire prevention and City-wide safety, and reduce the overall costs to the City.

This recommended organizational structure meets the needs of the City today, and provides a solid foundation for the future.

COUNCIL COMMUNICATION

K1

TO THE CITY COUNCIL
FROM THE CITY MANAGER'S OFFICE

DATE
SEPTEMBER 2, 1983

SUBJECT
DEPARTMENTAL REORGANIZATIONS

Council has received two organizational reports - one on the Fire Department prepared by City staff and one from Ralph Andersen and Associates on the Finance Department.

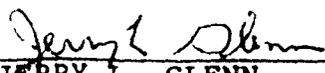
The study on the Finance Department is designed to provide better supervision in terms of work scheduling and monitoring of the field personnel, i.e., meter readers, parking enforcement assistants, and account collectors; reduce the span of control of the Assistant Finance Director and to clarify lines of responsibility and authority of the Senior Accountant as it relates to the accounting function.

In order to provide this needed supervision of field forces, a new position of Field Supervisor has been recommended. Council is asked to adopt the attached specifications for Field Supervisor, assign a salary range of \$1,579.05 to \$1,919.54, designate this as a mid-management position, and to reclassify Mr. Emery Holloway to this position.

The reorganization of the Fire Department is designed to clarify responsibilities at the fire scene, strengthen overall department management and administration, provide a person to assist in coordinating and monitoring a city-wide safety program, and provide additional assistance in the area of fire inspection. It will ultimately result in transferring the dispatch function to the Police Department and reduce overall manning by two persons in the Fire Department.

In order to accomplish this, three new classifications are required: Fire Administrative Officer, Fire Shift Supervisor and Fire Inspector. Council is requested to approve the following specifications at the appropriate salary levels, designate the Fire Administrative Officer's position as mid-management and reclassify Mr. Stanley Rall and Mr. Raymond Schatz to those positions.

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FIRE ADMINISTRATIVE OFFICER	\$1,867.74 - \$2,270.27


JERRY L. GLENN
Assistant City Manager

61

DEFINITION

Under direction, to have charge of and serve as a first line officer of an engine or truck company; to supervise personnel engaged in fighting fires; and to do related work as required.

EXAMPLES OF DUTIES

Takes charge of a Fire Station and supervises maintenance of quarters and equipment during an assigned shift; assigns and supervises personnel responding to emergencies, investigations, inspections and service calls; conducts drills and assists in the conduct of training programs for regular and call firemen; maintains discipline on calls and in company quarters; drives with and checks the judgment of lead-out driver in reaching the scene of the fire and in getting equipment into effective operation; determines the need of calling additional men and equipment in the absence of superior officer; establishes the formulation of an efficient plan of attack; reports to superior officers at the scene of a fire for further instructions after seeing that the equipment on which he arrived is hooked up and in operating order; responds to off-duty emergencies when needed; takes charge at fires until relieved; makes certain that fire equipment and alarm system is in running order; maintains record of each length of hose used at a fire to see to its replacement on equipment with dry hose and oversees that equipment is cleaned and ready for reuse; supervises men and equipment during inspections; advises public of fire regulations and fire hazards; summons off-duty personnel when number of on-duty personnel is below minimum in accordance with prescribed departmental procedures; receives fire calls and dispatches equipment to the fire; maintains records and prepares reports.

LICENSE

Possession of an appropriate California operator's license issued by the State Department of Motor Vehicles.

DESIRABLE QUALIFICATIONS

Knowledge of:

- Rules, policies and procedures governing the Lodi Fire Department;
- Firefighting methods, techniques, and equipment;
- Principles of hydraulics;
- Location of local water mains, fire hydrants, and other firefighting facilities;
- Local geography, including streets and buildings;
- Principles of First Aid.

and

K1

Fire Captain -- 2

DESIRABLE QUALIFICATIONS - Continued

Ability to:

Apply Fire Department rules, instructions, and firefighting methods to specific situations;
Plan, train, and direct the work of subordinates at Department quarters and at the scene of fires;
Prepare reports and speak effectively in public;
Establish and maintain cooperative working relationships with Department personnel, officials, and the public.

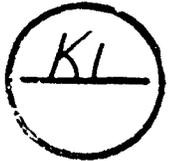
and

Experience: Five years of full-time paid experience in the City of Lodi Fire Department, and successful completion of a certified Fire Engineer Examination.

and

Education: Equivalent to completion of the twelfth grade.

City of Lodi



FIRE INSPECTOR

DEFINITION

Under direction, to perform fire inspection, investigation and prevention activities; to enforce fire codes, laws and regulations relating to fire protection, prevention and safety; and to do related work as required.

EXAMPLES OF DUTIES

Inspects for fire prevention and fire safety standards under the Uniform Fire Code, State Fire Laws and regulations, and related codes dealing with fire protection, prevention and safety; inspects business establishments, public buildings, single family and multiple occupancy residences, remodeled and new construction, and various other structures in the enforcement of fire prevention laws; inspects vapor recovery systems, fire escapes and emergency exits, fire and smoke alarms and sprinkler systems and other equipment related to fire safety and prevention; inspects hospitals, convalescent and retirement homes, and child care facilities; investigates fires involving loss of life, arson or of a suspicious nature, extensive property loss, and fires of undetermined origin, investigates citizen complaints of violations of fire codes and regulations and takes corrective action; promotes public relations for the Fire Department through promotional events, demonstrations, and educational programs on fire safety and prevention; meets with industrial and business representatives to promote cooperation on fire prevention measures; speaks to various civic and professional organizations to promote fire safety and prevention activities; prepares, files, and processes fire reports and maintains inspection records; issues permits for control burning, gas tank storage, pyrotechnics, high-hazard storage, blasting and other related items.

LICENSE

Possession of a valid Class III California Driver's License.

DESIRABLE QUALIFICATIONS

Knowledge of:

- Fire prevention and inspection techniques;
- Building construction materials and principles of combustion;
- Firefighting methods, techniques, and equipment;
- City codes for fire prevention, protection, and safety;
- State Fire laws and regulations and related codes dealing with fire protection, safety, and prevention;
- Legal procedures regarding enforcement of fire codes, laws and regulations;
- Principles of smoke, sprinkler, and fire alarm systems.

KL

Fire Inspector -- 2

DESIRABLE QUALIFICATIONS - Continued

Ability to:

- Establish and maintain cooperative working relationships in enforcing fire prevention laws and regulations;
- Apply the principles, practices, and procedures of firefighting to specific situations;
- Speak effectively to civic groups, other audiences and the general public;

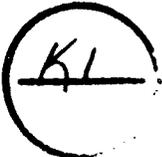
and

Experience:

Three years full-time paid experience in firefighting with the City of Lodi Fire Department.

and

Education: Equivalent to completion of the twelfth grade.



FIRE SHIFT SUPERVISOR

DEFINITION

Under direction, to have charge of and serve as officer-in-charge of an assigned shift; to supervise personnel engaged in fighting fires; and to do related work as required.

EXAMPLES OF DUTIES

Takes charge of a shift and supervises maintenance of quarters and equipment during an assigned shift; assigns and supervises personnel responding to emergencies, investigations, inspections and service calls; conducts drills and assists in the conduct of training programs for regular and call firemen; maintains discipline on calls and in company quarters; drives with and checks the judgment of lead-out driver in reaching the scene of the fire and in getting equipment into effective operation; determines the need of calling additional men and equipment in the absence of superior officer; establishes the formulation of an efficient plan of attack; reports to superior officers at the scene of a fire for further instructions after seeing that the equipment on which he arrived is hooked up and in operating order; responds to off-duty emergencies when needed; makes certain that fire equipment and alarm system is in running order; maintains record of each length of hose used at a fire to see to its replacement on equipment with dry hose and oversees that equipment is cleaned and ready for reuse; supervises men and equipment during inspections; advises public of fire regulations and fire hazards; summons off-duty personnel when number of on-duty personnel is below minimum in accordance with prescribed departmental procedures; receives fire calls and dispatches equipment to the fire; maintains records and prepares reports.

DISTINGUISHING CHARACTERISTICS

This position is distinguished from a Fire Captain in that the incumbent is assigned to Station #1. He will respond to all structure fires and will assume responsibility for the Fire Ground until relieved by a Chief Officer.

LICENSE

Possession of an appropriate California operator's license issued by the State Department of Motor Vehicles.

Fire Shift Supervisor -- 2

K1

DESIRABLE QUALIFICATIONS

Knowledge of:

- Rules, policies and procedures governing the Lodi Fire Department;
- Firefighting methods, techniques, and equipment;
- Principles of hydraulics;
- Location of local water mains, fire hydrants, and other firefighting facilities;
- Local geography, including streets and buildings;
- Principles of First Aid.

and

Ability to:

- Apply Fire Department rules, instructions, and firefighting methods to specific situations;
- Plan, train, and direct the work of subordinates at Department quarters and at the scene of fires;
- Prepare reports and speak effectively in public;
- Establish and maintain cooperative working relationships with Department personnel, officials, and the public.

and

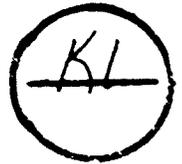
Experience: One year of full-time paid experience as Fire Captain in the City of Lodi.

and

Education: Equivalent to completion of the twelfth grade.

City of Lodi

FIRE ADMINISTRATIVE OFFICER



DEFINITION

Under general direction, to supervise the activities of training, fire inspection or administrative services in the Fire Department; and to respond to calls and assume command and to do related work as required.

EXAMPLES OF DUTIES

Responds to all structure fire alarms on assigned duty day and in the absence of the Chief, assumes command at the fire scene; gives general assistance to the Chief in administrative detail work; maintains regular departmental records of all activities; assists in the preparation of the departmental budget; requisitions supplies and prepares reports; when functioning as Administrative Assistant will perform the duties of the Fire Chief in administrative matters during extended absences of the Chief; assigns men and equipment, makes up watch schedule, and sees that it is followed; will work closely with City Administrative Staff and Department Heads to assist in establishing and monitoring a City-wide safety program.

When functioning as Fire Training Officer, will schedule and conduct classroom and field instruction and drill periods for all fire personnel in fire-related activities; identifies training needs, performs research to determine new and improved firefighting methods and tactics.

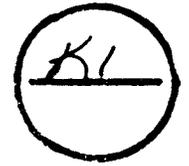
When functioning as Fire Marshal, will direct, monitor and perform fire inspections, investigations and prevention activities, enforce fire codes, laws and regulations relating to fire protection, prevention and safety, recommend and prepare changes to fire codes and regulations.

DESIRABLE QUALIFICATIONS

Knowledge of:

- Fire Department administration, science, principles, practices and methods regarding fire prevention and suppression;
- Fire prevention and inspection techniques;
- Use and maintenance of firefighting equipment and apparatus;
- Provisions of laws, ordinances, regulations and codes affecting the work of the Fire Department;
- Local geography, water supply, hazards, and other conditions relating to fire control in the City of Lodi

and



Fire Administrative Officer -- 2

DESIRABLE QUALIFICATIONS (Continued)

Ability to:

Identify training needs and to prepare, schedule and administer a comprehensive departmental training program;
Develop and maintain a fire inspection program;
Operate all types of firefighting equipment and apparatus and to instruct others in their proper use;
Keep records and prepare reports;
Establish and maintain cooperative working relationships with the public and City employees

and

Experience:

Five years experience in firefighting and fire prevention work, including two years of supervisory experience equivalent to Fire Captain,

and

Education:

Equivalent to completion of the twelfth grade supplemented by college-level courses in firefighting methods and procedures. A teaching credential issued by the State of California to teach fire science courses in junior colleges is highly desirable.

License:

Possession of an appropriate California operator's license issued by the State Department of Motor Vehicles.

Possession of a valid American Red Cross advanced First Aid Certificate.

MEMORANDUM, City of Lodi - Finance Department

TO: Henry A. Glaves, Jr., City Manager
FROM: Robert H. Holm, Finance Director
DATE: August 24, 1983
SUBJECT: Final Draft - Organizational Review
Finance Department - Ralph Andersen & Associates

I have reviewed the recommendations in Section III of the above subject report. While I agree in general with these recommendations, I have one area of concern that I wish to bring to your attention. The recommendation to just replace the Accounts Collector position with the Field Services Supervisor would force us to spend less time collecting delinquent accounts, which would then result in a decrease in cash flow. This recommendation merely shifts the supervision of the field personnel from the Assistant Finance Director and Senior Accountant to the Accounts Collector and reclassifies this position to Field Services Supervisor.

Presently the Accounts Collector and his assistant have the responsibility of contacting delinquent customers and arranging for payments and follow-up for promptness of payment, connecting and disconnecting electricity when customers move in and out of residences, turn off electricity and seal electric meters for non-payment after proper hearings have been held, follow up on bad checks, appear in Municipal Court, pick up the City's mail at the Post Office, and other duties as assigned.

To have the Accounts Collector supervise the field personnel would take 2½ hours away from his normal 6-hour collection day. This is a reduction of 31% of his time which is lost in collecting delinquent accounts. The new duties of the Field Supervisor would require him to set productivity standards for the meter readers, redesign routes so that one book of meter reads equals one day's work, and monitor the Parking Enforcement Assistants to ensure full utilization of their time (see pps 13 & 15 of the report).

I would recommend that we add to our staff an additional collector which, I feel, would pay for itself with additional cash flow and less delinquent accounts which are usually sent to a collection agency and subsequently written off by the City. I would like to illustrate this fact with the following calculations:

Assistant Accounts Collector at the E Step of \$1,543 x 12 months	=	\$18,518
Fringe benefits at 49%		9,072
	Total	\$27,590
Cost of vehicle for Assistant Account Collector.		
Annual depreciation		\$1,200
Annual maintenance & repair		200
Annual gasoline cost		570
	Total	\$1,970
TOTAL COST OF ADDITIONAL POSITION		<u>\$29,560</u>

Mr. Graves
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To calculate the potential changes in bad debt losses and carrying costs of delinquent accounts, I have set out three different situations: the situation as it is currently, as it would be per Ralph Andersen's proposal, and as I recommend with the addition of a new Assistant Accounts Collector.

	CURRENT OPERATION	ANDERSEN REORGANI- ZATION	ADD ASSISTANT ACCOUNTS COLLECTOR	SAVINGS: ANDERSEN VS NEW POSITION
DELINQUENT ACCOUNTS				
30 days	\$258,150	\$258,150	\$258,150	
60 days	64,350	74,000(1)	48,900(2)	
90 days	37,500	43,000(1)	19,500(2)	
Total Delinquents	\$360,000	\$375,150	\$326,550	
Interest Rate	x 8.5%	x 8.5%	x 8.5%	
DELINQUENT CARRYING COSTS (Loss of interest at the Bank)	\$ 30,600	\$ 31,890(1)	\$27,760(2)	\$ 4,130
BAD DEBT COSTS (Accounts which are turned over to collection agency and written off the books)	121,913	140,200	92,650	47,550
TOTAL COSTS	\$152,513	\$172,090	\$120,410	\$51,680

ASSUMPTIONS

DAILY COLLECTION STAFFING:

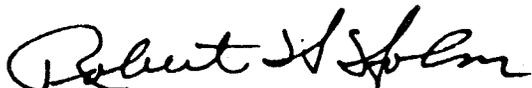
Holloway	6.0 hours	3.5 hours	3.5 hours
Meacham	2.0	2.0	2.0
New Position	-0-	-0-	6.0
TOTAL COLLECTION EFFORT	8.0 hours	5.5 hours	11.5 hours
PERCENT INCREASE (DECREASE)	-0-	(31%)	44%

- (1) RALPH ANDERSEN REORGANIZATION:
 Available time for collection will be reduced 31% because of Mr. Holloway's new duties. Sixty and ninety day old accounts and bad debts are conservatively estimated to increase 15%.
- (2) ADD ASSISTANT ACCOUNTS COLLECTOR:
 Available collection time would increase 44%. The main collection effort would be directed towards apartments (48% of current bad debts) in order to bring them down to 30 days maximum delinquent.

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One further comment that I would like to make in regards to having a Field Supervisor is that this position could also do field work in the enforcement of our business license program, such as contacting those firms that are working in Lodi but are not licensed. This would bring in additional revenue to the City.

I respectfully request that the Final Draft be accepted along with my additional recommendations as set forth in this memorandum.



Robert H. Holm
Finance Director
CITY OF LODI



**RALPH ANDERSEN
AND
ASSOCIATES**

JOHN M. SHANNON, JR.

1446 ETHAN WAY
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CITY CLERK
CITY OF LODI

EXHIBIT B

ORGANIZATION OF LODI FINANCE DEPARTMENT WITH PROPOSED CHANGES

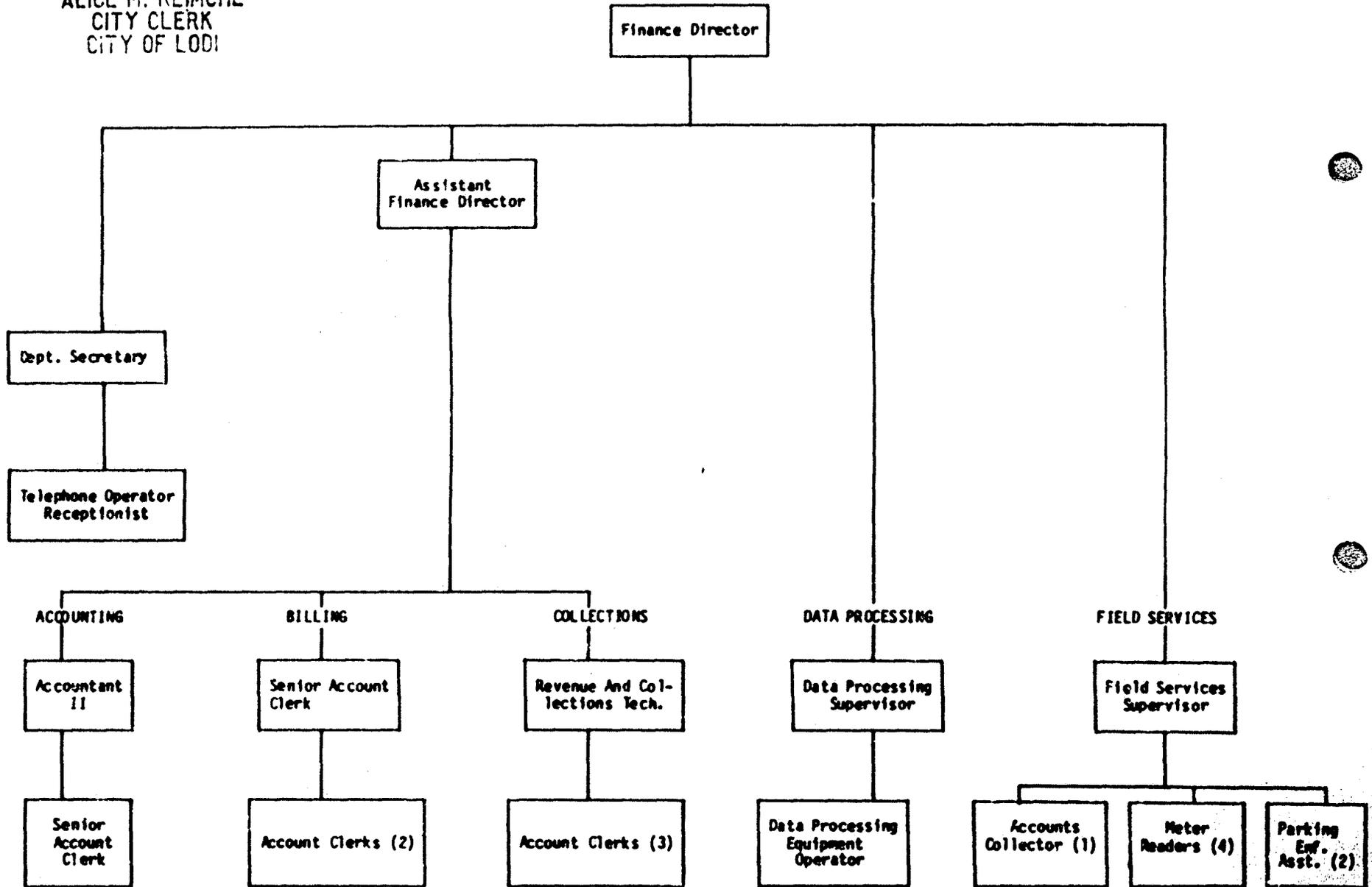


EXHIBIT B

ORGANIZATION OF LODI FINANCE DEPARTMENT WITH PROPOSED CHANGES

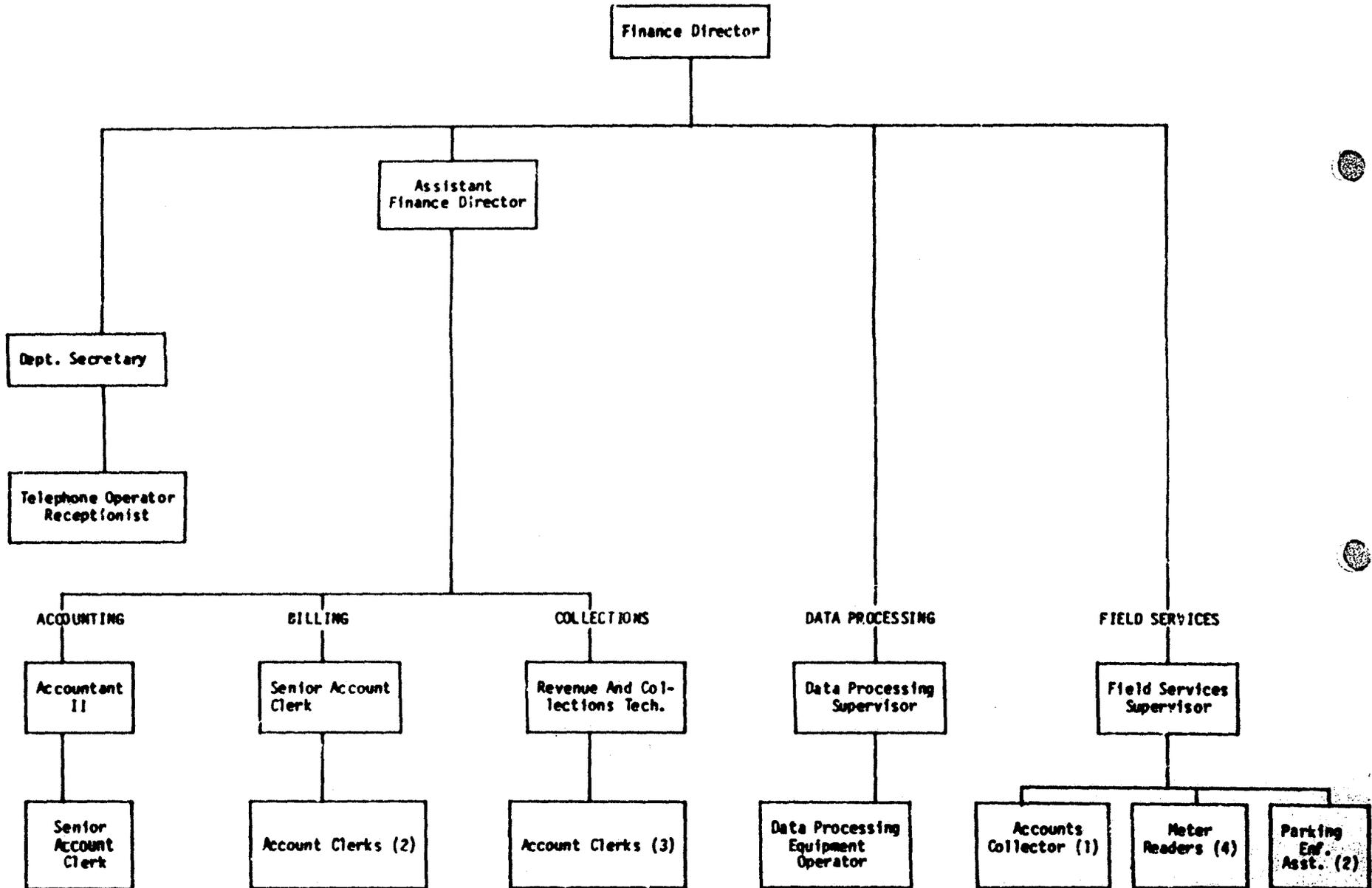
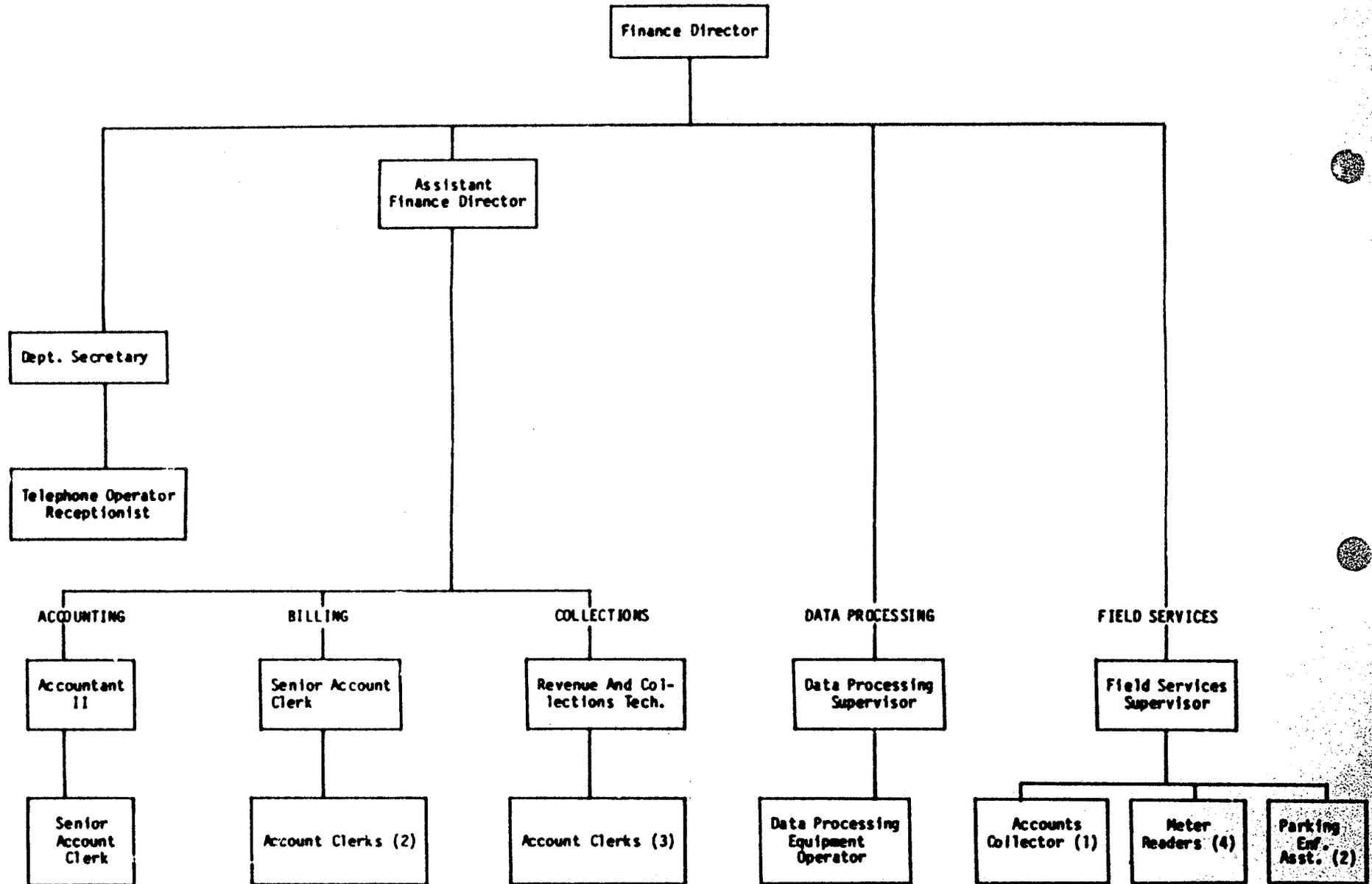


EXHIBIT B

ORGANIZATION OF LODI FINANCE DEPARTMENT WITH PROPOSED CHANGES





RALPH ANDERSEN AND ASSOCIATES

ORGANIZATIONAL REVIEW

FINAL REPORT

LODI FINANCE DEPARTMENT

ORGANIZATIONAL REVIEW

FINAL REPORT

LODI FINANCE DEPARTMENT

Prepared By:

Ralph Andersen & Associates
1446 Ethan Way
Suite 101
Sacramento, California 95825
(916) 929-5575

August, 1983



RALPH ANDERSEN AND ASSOCIATES

August 18, 1983

Henry A. Glaves, Jr.
City Manager
City of Lodi
221 West Pine Street
Lodi, California 95241

Dear Mr. Glaves:

We are pleased to submit this Final Report on our organizational review of the Lodi Finance Department. We appreciate the time spent by you, Mr. Jerry Glenn (Assistant City Manager) and Mr. Robert Holm (Finance Director) in reviewing the draft of this report. Revisions based upon that review process have been incorporated into this Final Report.

We have also reviewed the memorandum to you from Mr. Holm containing detailed analysis of our report (memorandum dated July 25, 1983). We appreciate the support and thoughtful analysis reflected in that memo. Our Final Report conforms to much of the contents of Mr. Holm's memo. However, we are not in a position to make a recommendation regarding his proposal to add an additional accounts collector position since we have done no analysis on this issue.

Please note that this report does not contain the titling changes that resulted from the classification analysis because these changes have not yet been implemented.

With your acceptance of this report, we will proceed to revise the class specifications for Finance Department personnel as appropriate. Release of allocation notices may take place immediately thereafter.

Thank you for the opportunity to conduct this organizational review and for the excellent cooperation of all City personnel involved.

Sincerely,

Ralph Andersen & Associates

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SECTION I--FACTUAL PROFILE

The Lodi Finance Department is one of the largest and most complex departments in the City of Lodi. It contains 26 positions which are organized into five sections: Accounting, Billing, Collections and Credit, Data Processing, and Parking Enforcement. In addition to the Parking Enforcement section, there are two other field-oriented work units among the sections: Meter Readers are part of the Billing section, and Account Collectors are part of the Collections and Credit section. Therefore, there are a total of seven identifiable work units in the Department.

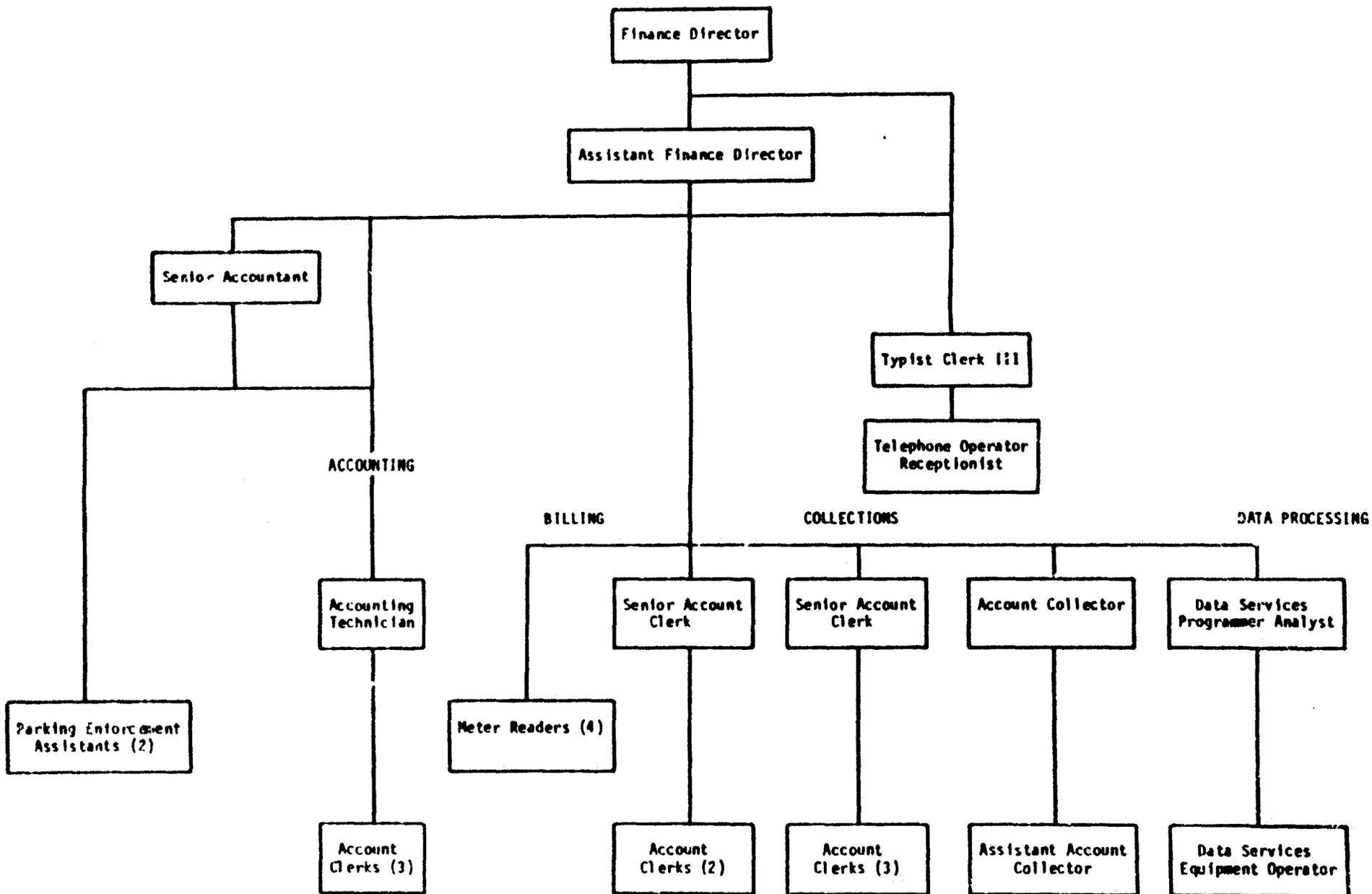
An organization chart for the Department is shown in Exhibit A. Of the seven distinct work groups, six of them report to the Assistant Finance Director; the Parking Enforcement Assistants report to the Senior Accountant. The Accounting Technician in Accounting reports to both the Senior Accountant and Assistant Finance Director. There are two clerical positions in the Department. The Telephone Operator Receptionist reports to the Typist Clerk III who reports to both the Finance Director and the Assistant Finance Director.

In five of the seven work units, there is a lead worker who functions as a section supervisor. These lead worker/supervisors are the Accounting Technician, Senior Account Clerk (Billing), Senior Account Clerk (Collections), Accounts Collector, and Data Services Programmer Analyst. The Parking Enforcement and Meter Reader sections do not have lead workers.

The remainder of this section briefly discusses the objectives and activities of each Department section. To be consistent with the primary focus of this organizational review, the emphasis of the discussion is on position structure, reporting relationships, and distribution of workload.

EXHIBIT A

CURRENT LODI FINANCE DEPARTMENT ORGANIZATION



MANAGEMENT STAFF

There are two managerial positions in the Department--the Finance Director and Assistant Finance Director. The Director is responsible for Departmental policies, priorities, assignment of duties, and liaison with the City Manager's Office and other City Departments. The Director also assumes specific responsibility for investment management of City assets. The Assistant performs managerial and supervisory duties, prepares accounting and administrative reports, coordinates compilation of the City's operating budget, serves as City Purchasing Agent, is a technical resource for accounting procedures, and assists in the development of new computer applications.

BILLING

The Billing section is comprised of a Senior Account Clerk, two Account Clerks, and four Meter Readers. Part-time assistance for the clerical billing process is regularly employed.

The City of Lodi administers its own electric utility. This has a major impact on the operations of the Finance Department, as well as other departments. A primary responsibility of the Billing section is to send out monthly bills to over 16,000 accounts. For each account, the Finance Department computes the amount of the electric bill based upon usage amounts obtained from the Meter Readers. The utility billing also contains flat rate sewer, water, and refuse charges which are automatically incorporated into the bills.

The Meter Readers read electric meters once per month. Their readings must be turned in and entered into the computer before billings

can go out. Billings go out in batches of 500 or more on a cycle billing basis. At the end of each month, routine accounting procedures are conducted that require all readings to be entered. No new month billings can go out until the "books are closed" for the prior month.

COLLECTIONS AND CREDIT

This section contains an Accounts Collector, Assistant Accounts Collector, a Senior Account Clerk, and three Account Clerks. Part-time help regularly assists the clerical collections process.

The Collections section has the responsibility for processing payments on the over 16,000 utility accounts. In addition, revenue comes into the City from a variety of other sources such as business licenses, hotel/motel tax, and dog and cat licenses. Utility payments are made through the mail and in-person. A daily collections report is submitted to the Accounting section which subsequently enters this revenue data into the computer.

Delinquent accounts are referred to the Accounts Collector and his Assistant. Contacting delinquent customers, collecting overdue payments, and sealing meters for non-payment are the responsibility of this section. Personnel in this section also follow-up on bad checks and appear for the City in Small Claims and Bankruptcy Courts.

The Senior Account Clerk in this section is responsible for enforcement of the business license ordinance in Lodi. This entails identifying possible violators, contacting them, and collecting license fees. The Account Clerks are assigned specific duties in this regard. The Senior Account Clerk also has responsibility for

assisting the Finance Director in his role as Treasurer. Revenue information and current interest levels are researched by this position to assist the Director's investment decision-making.

ACCOUNTING

The Accounting section contains an Accountant, an Accounting Technician, and three Account Clerks. Among the Account Clerks are two specialized positions; one is the "Payroll Clerk" and one is the "Payables Clerk". The third Account Clerk works with receivables and other procedural areas.

Professional level accountant work is performed by the Senior Accountant. This includes year-end accounting procedures, preparation of a number of reports and statements, complex journal entries, and liaison with auditors. Routine accounting work such as bank reconciliations and routine journal entries are performed by the Accounting Technician.

DATA PROCESSING

Automated data processing supports nearly every major function of the Finance Department. Programs presently automated include: payroll and personnel, utility billing, general ledger, expenditures, revenues, and business licenses. This department section contains a Data Services Programmer Analyst and a Data Services Equipment Operator. Operations for the various program, program changes, and

new programming is the responsibility of the Programmer Analyst. Daily operations procedures are performed by the Equipment Operator.

PARKING ENFORCEMENT

There are two Parking Enforcement Assistants in the Finance Department, both of which report to the Senior Accountant. These positions work staggered work weeks, Monday through Friday and Tuesday through Saturday. In the past, the City had parking meters. These have since been removed, so enforcement is done using chalk marks. The Parking Enforcement Assistants also are assigned to relieve the Telephone Operator Receptionist during morning and afternoon breaks.

CLERICAL

The Department employs two clerical positions. The Finance Director and Assistant Finance Director supervise a Clerk Typist III position who serves as a department secretary. This position supervises the Telephone Operator Receptionist who answers the telephone for all City Hall personnel and is a receptionist in the main lobby.

SECTION II--ORGANIZATIONAL ISSUES
AFFECTING DEPARTMENTAL STRUCTURE

This section identifies and discusses those organization and management issues that, in the consultant's opinion, have implications for Departmental structure. The basis for these observations are:

- . Information in Position Description Questionnaires completed for the recent classification study conducted by Ralph Andersen & Associates
- . Departmental memorandums, Auditor management letters, and other internal materials
- . Interviews conducted for the classification study (all positions)
- . Interviews conducted specifically for this organization review (managerial, supervisory, and lead worker positions).

The interview process helped identify operational problems that may be addressed by organizational realignment. The major issues identified and discussed below are:

- . Supervision of field personnel
- . Span of control of the Assistant Finance Director position and diffusion of supervisory responsibility among multiple sections
- . Supervision of the Accounting section and distribution of accountant duties within the section.

It will become clear as discussion ensues that these issues are highly inter-related. Because this is so, the structural realignment

alternatives that address these problems are not extensive or complicated. A single set of changes should adequately rectify the problems discussed below.

SUPERVISION OF FIELD PERSONNEL

The single most common problem surfacing during interviews pertained to the supervision of field personnel, in particular, the Meter Readers. With these positions and with the Parking Enforcement Assistants, supervisory staff spoke of the difficulty of monitoring productivity. It is with the Meter Reader positions that the problem produces a dramatic effect since their function is the first link in a procedural chain involving all sections of the Finance Department.

The supervision of the Meter Readers is a problem presently being addressed by the Department. Two innovations are being considered:

- . Setting of standards for productivity by measuring time requirements for the various reading routes

- . Hand-held automated reading devices

Both innovations would require considerable resource investment by the City. Setting productivity standards would require approximately four months of a supervisor's time and the automated devices would require a capital investment of \$50-70,000.

Presently, the City has little means of determining the adequacy of Meter Reader productivity. Because there are no detailed productivity standards, and because the reading books (and the geographic deployment of personnel) are not designed to maximize productivity and facilitate monitoring, the City cannot closely supervise the Meter Readers. One thing is certain--when the Meter Readers get behind, there results a burdensome and costly backloging of workload throughout the rest of the Finance Department.

Whether or not the City pursues the setting of standards and the purchase of automated devices, the Meter Reader work unit is in need of closer supervision. These positions presently report to the Assistant Finance Director, a position which besides having five other work units to supervise, is essentially office-bound. No supervision of Meter Readers in the field takes place.

FINDING--The Meter Reader work unit requires closer supervision by a position able to monitor field activities on a regular basis.

Supervision of the Parking Enforcement Assistants poses a similar problem. When the City had parking meters, it was relatively simple to monitor the productivity of these positions. Parking tickets could be written every several minutes, forming a log of the activity of the officers. Since the parking meters were removed, monitoring has become problematic.

FINDING--The Parking Enforcement Assistants require closer supervision by a position able to monitor field activities on a regular basis.

DISTRIBUTION OF SUPERVISORY RESPONSIBILITY

Considering the Finance Department as a whole, it is clear that supervisory responsibility is formally consolidated in one position--the Assistant Finance Director. This position directly supervises six sections, including both office and field units. He also directly supervises the Senior Accountant, who is responsible for supervising the Parking Enforcement Assistants.

The broad span of control in the Assistant position has led to the diffusion of supervisory responsibility to lead workers in the sections. Since the Assistant cannot possibly supervise each section on a daily basis, daily supervision actually is exercised at the lead worker level. The Assistant Finance Director actually is performing a managerial and staff role for the Department as evidenced by many of his primary duties:

- . Compilation of City operating budgets
- . Preparation of accounting and administrative reports
- . Technical advisor to subordinate sections
- . Development of new computer applications.

The Assistant is not involved in the daily assignment, direction, and review of work within each section. Daily supervision is performed by non-supervisory staff, i.e., lead workers.

FINDING--The distribution of supervision within the Department formally is consolidated in too few positions (the Assistant Finance Director only) and actually is performed by too many positions (the lead workers).

ACCOUNTING SECTION STRUCTURE

The Accounting section is a key work unit in the Department. Activity information from the Billing and Collections sections is channeled daily to Accounting and its procedural connection with Data Processing is extremely close. Accounting section staff key in data and work with the reporting output of the EDP system. The section's procedures tie into virtually every other section in the Department and encompass virtually every Department in the City.

Until recent years, the Finance Department functioned without the Senior Accountant position. Over time, a long-term incumbent in the Accounting Technician position acquired responsibility for many routine accountant functions. With the advent of the Senior Accountant, the Technician retained these duties as well as daily supervisory responsibility for the three subordinate positions in the section. As a hold-over from past practice, the Technician reported to the Assistant Finance Director as well as to the Senior Accountant.

The present situation is such that the Accounting Technician (recently retired) was a long-term employee, performed a vital set of complex clerical and routine professional accounting duties, and had a dual reporting responsibility. The questions arise:

- . Who is responsible for the supervision of the Accounting Section?
- . How is the Accounting Technician position to be replaced, given its unusual set of duties?

The latter question is germane since the incumbent recently retired. The former question is an issue related to the approach to be taken in filling the gap left by the Accounting Technician.

FINDING--The Accounting Technician position was supervised by two positions; the position is structured as a combination clerical/ entry-level professional position that is not easily replaced.

SUMMARY

This section has identified and discussed the major issues to be addressed by this organizational review. These issues are inter-related and pertain to the structure of the Department and the distribution of work assignments and supervisory responsibility. The following section presents recommendations that address the problems inherent in the issues identified.

SECTION III--RECOMMENDATIONS

A reorganization of the Lodi Finance Department, to address the issues discussed in the previous section, should pursue the following objectives:

- . Improved supervision of field personnel
- . Better balance and definition of supervisory responsibility
- . Clarity in the supervision of the Accounting section and a functional distribution of accountant duties within the section.

To achieve these objectives, there are three basic changes in the organizational structure that may be pursued. Each of these is discussed below, and to assist in their understanding, an organization chart reflecting these changes is shown in Exhibit B.

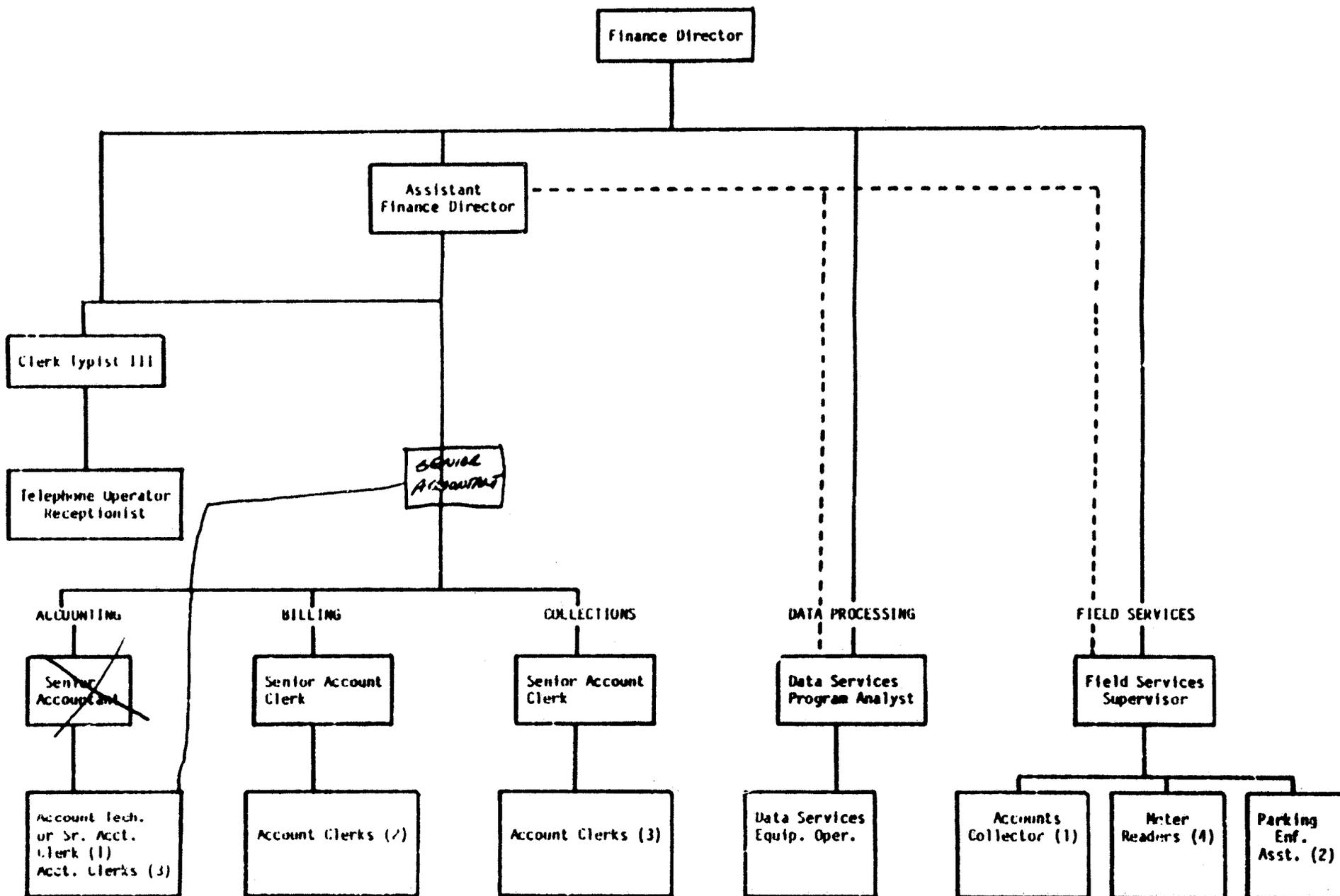
CREATION OF A FIELD SERVICES SUPERVISOR POSITION

This Supervisor would have responsibility for Accounts Collection, Meter Readers, and Parking Enforcement. The Supervisor would be out in the field a substantial portion of the time and represent a visible supervisory presence (or potential presence) to field staff. Other functions of this position would be to:

- . Pursue the setting of productivity standards for Meter Readers
- . Redesign reading routes so that one "book" equals one day's work

EXHIBIT B

ORGANIZATION OF LODI FINANCE DEPARTMENT WITH PROPOSED CHANGES



- . Monitor Parking Enforcement Assistants, specifically to ensure full utilization of their time.

One of the advantages of having a Field Services Supervisor is the ability to coordinate daily assignments to handle the workload. A primary objective of the enhanced supervision would be to maintain a 30 day cycle for electric utility billing and avoid backlogs and delays in other sections of the Department.

RECOMMENDATION--Create a Field Services Supervisor position to replace the Accounts Collector position. The Assistant Accounts Collector position should be re-titled as Accounts Collector, although the duties of this position would not change. A proposed class specification for the Field Services Supervisor position is shown in Appendix A.

NARROWING OF SUPERVISORY RESPONSIBILITY OF ASSISTANT FINANCE DIRECTOR

By assigning daily supervision of field sections to a Field Services Supervisor, the Assistant Finance Director is relieved of a burdensome supervisory task. The Assistant would maintain authority over the Field Services Supervisor and would work with him on certain objectives, but the Field Services Supervisor would report directly to the Director. The Finance Director needs to have a direct line of communication and authority with the individual supervising three field units, all of which have extensive public contact.

As shown in the proposed organization chart in Exhibit B, it is also recommended that the Data Processing supervisor report directly to the Finance Director. This is suggested for two major reasons:

- . Data processing supports the Field Services units, although to a lesser degree than the office units. (In the future, it could support field services more than now, such as a scheduling program for Meter Reader routes or direct interface with Meter Reader data input.) Since D.P. supports office and field functions, it should report to a managerial position responsible for both.

- . It is likely that future computer applications will serve functions outside the Finance Department. If so, control of D.P. operations should be managed by the Director, who can best coordinate D.P. operations involving other departments.

By instituting a Field Services Division and having D.P. report to the Director, the Assistant Finance Director could concentrate his supervisory efforts on three office sections: Billing, Collections, and Accounting. The Assistant would still have substantial interaction with both Field Services and D.P. in technical direction and coordination, but formal supervisory authority would be assigned to the Director. Having three major sections represents a balanced span of control for the Assistant position.

RECOMMENDATION--Narrow the supervisory responsibility of the Assistant Finance Director.

DUAL SUPERVISION OF ACCOUNTING TECHNICIAN POSITION

The Accounting Technician should report only to the Senior Accountant. This step would have three benefits. First, it would clarify supervisory responsibility for the Accounting section by vesting this solely in the Senior Accountant. Second, it would better allow the Senior Accountant and Accounting Technician position to clarify distribution of accountant procedures. Third, it would further relieve the Assistant Finance Director of supervisory responsibility by squarely placing it with the Senior Accountant.

If the Assistant Finance Director and the Senior Accountant are relieved of their responsibilities for supervising field personnel, they both presumably would have more time for professional accounting work. This circumstance may allow a redistribution of duties so that the Accounting Technician position is redesigned to be purely an advanced clerical position and not a combination clerical/entry-level professional position. Such a redesigned position would be more easily recruited either from within the Accounting section, from another Department section, or from the external labor market. This opportunity should be explored by Departmental management staff before the Accounting Technician position is filled.

RECOMMENDATION--Eliminate the dual supervision of the Accounting Technician by having that position report only to the Senior Accountant.

SUMMARY

The analysis and recommendations in this report suggest a shifting of emphasis within the Department and a redistribution of duties.

Increased emphasis on field supervision is needed. This would not only result in closer monitoring of field productivity, but also would allow the professional accountants in the office to more closely supervise office staff and participate in accountant duties. This in turn may result in an opportunity to redesign the Accountant Technician position to that of a Senior Account Clerk.

The proposed structure allows for the future growth of the Department. As field staff increase, lead workers in those units may emerge. As office staff increase, the Senior Accountant position can take on more direct line supervision or another professional accountant position recruited to supervise a section(s) and perform professional accountant work. The proposed changes address the immediate problems of the Department and allow for growth to respond to future challenges.

APPENDIX A--CLASS SPECIFICATION FOR A
FIELD SERVICES SUPERVISOR

*

FIELD SERVICES SUPERVISOR

DEFINITION

Plans, organizes, directs, and reviews the work of field units in the Finance Department including Meter Readers, Parking Enforcement Assistants, and Accounts Collectors; performs the duties of an accounts collector and other enforcement duties in the revenue collections process.

DISTINGUISHING CHARACTERISTICS

This supervisory position has responsibility for all field units in the Finance Department. The Field Services Supervisor spends considerable time in the field supervising field personnel and performing the duties of an Accounts Collector.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Finance Director.

Exercises general supervision over Meter Readers, Parking Enforcement Assistants, and Accounts Collectors.

EXAMPLES OF DUTIES - Depending upon assignment, duties may include, but are not limited to, the following:

Plans, organizes, directs, and reviews the work of field units.

Assists in the preparation of budgets for field units.

Assists with and perform a variety of personnel actions including selections, promotions, performance evaluations, disciplinary measures, and dismissals.

Evaluates the operations of field units; recommends and implements improvements to systems and procedures.

Coordinates with office staff to facilitate timely performance of Department procedures.

Contacts delinquent accounts and makes arrangements for payment. Follows up to see that arrangements are kept.

Receives and decides upon requests for extensions to payment.

Seals meters for nonpayment.

Contacts persons who have written bad checks.

Appears in Small Claims Court; obtains judgments and writs of execution.

Files claims with Bankruptcy Court.

Assists with the enforcement of the Lodi Business License ordinance.

Performs related duties as required.

QUALIFICATIONS

Knowledge of:

Principles and practices of supervision.

Procedures involved in reading meters, enforcing parking laws, billing utilities accounts, and collecting delinquent accounts.

Public contact practices and techniques.

Basic electrical and mechanical systems.

Ability to:

Supervise the work of others.

Evaluate systems and procedures; make effective recommendations for improvement.

Interact effectively and courteously with the public, including the handling of irate utility customers.

Perform mechanical tasks on utility meters (sealings, hook-ups).

Communicate clearly and concisely.

Experience and Education

Any combination of experience and education that would likely produce the qualifying knowledge and ability. A typical combination is:

Experience:

Four years experience in a position involving public contact or field operations, two of which were in a lead or administrative capacity.

Education:

Completion of high school or its equivalent.

Licenses or Certificates

Possession of a valid Driver's License issued from the California Department of Motor Vehicles.



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