



HUMAN RESOURCES DEPARTMENT

City of Burlington

179 South Winooski Avenue, Burlington, VT 05401

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Vermont Relay: call 7-1-1 or 800-253-0191

To: Board of Finance

From: Benjamin Pacy, Human Resources Generalist
Susan Leonard, Human Resources Director

Date: September 19, 2012

Re: Burlington Electric Department – Elimination of Vacant Grade 10, Work Order Accountant Reclassification of Grade 7 Administrator of Accounts Payable, to Grade 8 Administrator of Cash Receipts, Work Order Accounting, and McNeil Accounts Payable,

We respectfully recommend the approval of the reorganization requested by the General Manager of Burlington Electric Department as detailed in the attached memo.

The reorganization calls for the elimination of a vacant grade 10, Work Order Accountant currently budgeted at \$61,645. Duties of the position have been reassigned to three existing positions as indicated in the current and proposed job descriptions attached. All three positions were reviewed for reclassification. The duties assigned to the two work level 10 positions, Supervisor of Customer Services and Billing Service Coordinator did not meet the threshold for an increase in classification. The addition of substantive new responsibilities, specifically, all work order related accounting, to the grade 7, Administrator of Accounts Payable position did raise to the level warranting reclassification and an associated change in title to Administrator of Cash Receipts, Work Orders and McNeil Accounts Payable.

The position was classified using a Modified Winters Non-Exempt Classification Plan and Scale (attached). The classification resulted in the position being increased one level, from a 7 (seven) \$26.93 (or 100% of Level 7) with a corresponding annual salary of \$56,014, to a grade 8 (eight). In accordance with policy, the incumbent will enter the grade at the lowest step that ensures at least a 5% (five) percent increase over his current step, which in this case, is 98.7% of grade level 8, with a corresponding annual salary of \$58,815. This \$2,800 increase in the incumbent's annual salary is offset by the elimination of the \$61,645 annual salary of the grade 10 Work Order Accountant, resulting in an FY13 savings of \$58,845.

The reorganization shall be effective following City Council approval.

Thank you for your consideration.



585 Pine Street • Burlington, VT 05401-4891
802/658-0300 • 802/865-7386 (TTY/Voice) • Fax: 802/865-7400

September 10, 2012

Board of Finance
City of Burlington, Vermont

Re: BED Reclassification of Accounts Payable/Cash Receipts/Work Order Accounting

Gentlemen/Ladies:

With a recent retirement within BED's Finance and Accounting staff, an opportunity developed that allowed us to redefine certain tasks and responsibilities of the vacated position, both in cost savings and efficiencies. The plan began by unbundling certain tasks within the vacated Work Order Accounting/Collections/Bankruptcy Coordinator's job description. There were certain components that were best accomplished in Customer Services and Metering, and those Departments have agreed to this transition. The majority of the remaining tasks will stay with BED's Finance and Accounting office, including but not limited to, work order related billings, cost analyses, and other semi-annual duties.

In conjunction with that evaluation, staff evaluated closely the Accounts Payable-McNeil/Cash Receipts position and determined, not only did we have an individual capable of doing the additional tasks, but more importantly, assigning these tasks will claim efficiencies within the Department.

Our current plan leaves the Work Order/Collections/Bankruptcy Coordinator position vacant for up to 12 month (August 2013) to ascertain whether the transition truly functions according to staff projections.

We recently asked Human Resources to re-evaluate the enhanced job description for the BED Accounts Payable-McNeil/Cash Receipts/Work Order Accounting position, recognizing the consolidated duties and responsibilities. Results of their review have suggested a grade change from 7 to 8 in the BED/IBEW classification for the non-exempt hourly wage table. There is no budget impact as the position being eliminated was fully funded in the budget, therefore "net savings" will result.

I respectfully ask the Board of Finance to recommend to the City Council that it authorizes this grade change as outlined.

Thank you for your consideration.
Sincerely,

A handwritten signature in cursive script that reads "Barbara" followed by a horizontal line.

Barbara Grimes
General Manager



Energy Efficiency
A Way of Life

Essential Job Functions - Work Order Accounting/Collections/Bankruptcy Coordinator

- To AP/CR/WOA** 1. Audits work order activity for accuracy, including but not limited to, initial set-up of McNeil work orders, inventory issues and returns, proper categories, project numbers, timely closings, etc.
- To AP/CR/WOA** 2. Prepares billings related to chargeable work requests and responds to customer inquiries.
- (Delete)** 3. Produces a variety of reports on a wide array of work order information to BED personnel as required.
- To AP/CR/WOA (rework)** 4. Creates and maintains accounts receivable ledgers, worksheets and reports.
- To AP/CR/WOA** 5. Audits timesheets, including but not limited to, work requests, job order number, assigned account, project number, updating and maintenance of vehicle time, etc.
- To AP/CR/WOA** 6. Post asset records to the fixed asset software, using established Department criteria.
- To AP/CR/WOA** 7. Develops and maintains a Work Order Accounting and Miscellaneous Receivables Procedures Manual.
- To AP/CR/WOA** 8. Creates and maintains all work order accounting reports and files, and manages its records retention program.
- To AP/CR/WOA** 9. Institutes and maintains appropriate work order system internal controls, including but not limited to, miscellaneous billings, collections, bankruptcies, write-offs, etc.
- To BSC** 10. Processes meter activity in customer accounting system, including new sets, meter exchange and removals.
- To metering dept** 11. Balances meter inventory at the end of the month to provide totals for the Meter Department's monthly report.
- To BSC** 12. Reviews and assigns rate on customer account for all new meter sets.
- To AP/CR/WOA (rework)** 13. Prepares miscellaneous billings for McNeil, Demand Side Management (DSM), Grants and Special Contracts, etc.
- To BSC** 14. Maintains leased-light activity in customer accounting system including data entry for installations, removals and billing information
- To ACES** 15. Processes, maintains and coordinates bankruptcies claims, reports, and related files with BED's legal representative.
- To ACES** 16. Coordinates liens against property owners with BED's legal representative.
- To BSC** 17. Processes and maintains files on monthly write-offs of final accounts.
- To BSC/ACES** 18. Maintains detailed records and reports on all collection processes and corresponds with legal counsel, collection agencies and customers on various collection activities.
- To AP/CR/WOA** 19. Responds to auditor inquiries during fiscal year end audits.
- (Delete)** 20. Provides back-up coverage for Billing Services, including but not limited to, timely and accurate processing of all cycle and final billings, etc.
- To AP/CR/WOA** 21. Performs other responsibilities in the absence of co-workers and during periods of high volume as directed.
- To AP/CR/WOA** 22. Performs other duties as required.

City of Burlington Job Description

Position Title: Administrator of Cash Receipts, Work Order Accounting and McNeil Accounts Payable

Department: Burlington Electric Department

Reports to: Controller

Pay Grade: Level 8

Exempt/Non-Exempt: Non-Exempt

Job Code: ____

Union: IBEW

General Purpose:

This position is responsible for the administration of 1) the Department's automated Accounts Payable system for the McNeil Generating Station accounts including all internal/external reporting, analyses, internal controls, and procedures; 2) - the administration of BED's automated payment processing system and coordinating with lock box processing services (cash receipts); and 3) the automated work order system, including billing and receivables.

Essential Job Functions:

1) Accounts Payable – McNeil:

- Audits invoices to ensure compliance with Department Purchasing Procedures Manual and Federal Energy Regulatory Commission (FERC) System of Accounts.
- Prepares invoices for payment. Prioritizes invoice payments to take advantage of term discounts, and resolves all vendor statement discrepancies.
- Audit wood chip fuel invoices for accuracy and process for payment.
- Analyzes and audits the application of sales taxes, retainage and 1099 requirements.
- Audits the Accounts Payable month and year end closings and reports to ensure accurate recording of accruals.
- Prepares a variety of AP reports and analyses for other areas as requested.
- Develops and maintains an Accounts Payable Procedures Manual.
- Maintains McNeil Accounts Payable reports and files..
- Maintains Accounts Payable system internal controls, including but not limited to, purchase orders, invoice payment approval, receiving reports, etc.
- Responds to auditor inquiries during fiscal year end audits.
- Provides back-up coverage for Accounts Payable – Operating function.

2) Cash Receipts:

- Processes miscellaneous customer cash payments and electronic payments as necessary.
- Prepares a timely and accurate daily bank deposit and coordinates delivery to the bank.
- Acts as liaison to banking personnel for deposits, issues with automatic debit processing, or issues with missing payments; resolves any discrepancies with customer and employee inquiry.

- Records and reconciles daily cash with billing services; reviews cash payments edit listings for appropriate account application.
- Processes reversing entries for check and auto debit rejections (NSF's), including contacting customers to make settlement arrangements, misdirected payments with appropriate documentation.
- Interacts with Customer Service as needed for issues with residential commercial accounts, customer payments, and other issues including returned checks or auto debits.
- Audits and reconciles "BECS Refunds/Credits Only" account and ensures a zero balance.
- Develops and maintains a Cash Receipts Processing Procedures Manual.
- Creates and maintains cash receipts reports and files and manages its records retention program.
- Works closely with State of Vermont's Fuel Assistance program to accurately post applicable payments for mutual customers, administers confidential customer bank information and fuel assistance records, and prepares annual reconciliation of Fuel Assistance program receipts.

3) Work Order Accounting:

- Audits work order activity for accuracy, including but not limited to, inventory issues and returns, proper categories, project numbers, and timely closings.
- Prepares billings for reimbursable work requests and responds to customer inquiries.
- Prepares billings for work requests associated with grants, special contracts, or other funding mechanisms.
- Maintains a variety of reports of work order accounting, including ledgers, worksheets and other reporting needs.
- Audits timesheets for accuracy of charges to work requests, including job order number, assigned project number, and allocation of vehicle time and maintenance.
- Creates and maintains all work order accounting reports and billing files, and manages its record retention program.
- Maintains and updates Work Order Accounting and Miscellaneous Receivables Procedures Manual, and appropriate internal controls as relates to work order system including billing and collections.
- Post asset records to the fixed asset software, using established criteria.
- Process all special billings and payments as needed, including but not limited to, work request deposits, scrap metal sales, joint-pole, special metering, Hardwick and Morrisville dispatch services, and processing insurance claims.
- Responds to auditor inquiries during fiscal year end audits.
- Responsible for A-133 Single Audit requests, pursuant to specific grant guidelines and assures compliance with federal and state grant accounting criteria and GAAP.
- Completes semi-annual billing for the pole attachments and conduit rental, ensuring compliance with associated tariff and special contracts.

Other:

- Provides secondary backup to payroll administrator.
- Performs other responsibilities in the absence of co-workers and during periods of high volume as directed.
- Performs other duties as required.

Qualifications/Basic Job Requirements:

- Associate's Degree in Accounting, Business Administration or related field, four years of relevant work experience may be substituted for the educational requirement. Two (2) years of relevant experience required, previous electric utility experience is preferred.
- Must have strong organizational, personal computer and calculator skills.
- Ability to operate in a Windows based operating environment using word-processing and spreadsheet software required.
- Ability to operate a 10 key calculator required.
- Ability to organize, prioritize workflow and meet established deadlines required.
- Ability to analyze data with particular attention to detail required.
- Ability to communicate effectively both orally and in writing required.
- Knowledge of the Federal Energy Regulatory Commission (FERC) system of accounts preferred.
- Ability to recognize software problems and to effectively communicate to IS department and/or vendor technical support.
- Must have a high level of personal creativity, initiative and enthusiasm to work within a team environment within a constantly changing organization.
- Ability to work well under pressure and with minimal supervision.
- Demonstrated high level of initiative in problem solving.
- Must be consistent and accurate.
- Ability to establish and maintain positive working relationships with co-workers, customers, vendors and other personnel.
- Must be able to listen to and appropriately react to a supervisor's constructive criticism and incorporate it to improve employee performance..

Physical & Mental/Reasoning Requirements; Work Environment:

These are the physical and mental/reasoning requirements of the position as it is typically performed. Inability to meet one or more of these physical or mental/reasoning requirements will not automatically disqualify a candidate or employee from the position. Upon request for a reasonable accommodation, the City may be able to adjust or excuse one or more of these requirements, depending on the requirement, the essential function to which it relates, and the proposed accommodation.

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| <input checked="" type="checkbox"/> seeing | <input checked="" type="checkbox"/> ability to move distances | <input checked="" type="checkbox"/> lifting (specify) |
| <input type="checkbox"/> color perception | <input type="checkbox"/> within and between | <input type="checkbox"/> 30_ pounds |
| <input type="checkbox"/> (red, green, amber) | <input type="checkbox"/> warehouses/offices | <input checked="" type="checkbox"/> carrying (specify) |
| <input checked="" type="checkbox"/> hearing/listening | <input type="checkbox"/> climbing | <input type="checkbox"/> 30_ pounds |

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| <input checked="" type="checkbox"/> clear speech | <input type="checkbox"/> ability to mount and
dismount forklift/truck | <input type="checkbox"/> driving (local/over
the road) |
| <input checked="" type="checkbox"/> touching | <input type="checkbox"/> pushing/pulling | |
| <input checked="" type="checkbox"/> dexterity | | |
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| <input type="checkbox"/> reading – basic | <input type="checkbox"/> math skills - basic | <input checked="" type="checkbox"/> analysis/comprehension |
| <input checked="" type="checkbox"/> reading – complex | <input checked="" type="checkbox"/> math skills - complex | <input checked="" type="checkbox"/> judgment/decision
making |
| <input type="checkbox"/> writing – basic | <input checked="" type="checkbox"/> clerical | |
| <input checked="" type="checkbox"/> writing – complex | | |
| <input type="checkbox"/> shift work | <input type="checkbox"/> outside | <input type="checkbox"/> pressurized equipment |
| <input checked="" type="checkbox"/> works alone | <input type="checkbox"/> extreme heat | <input type="checkbox"/> moving objects |
| <input checked="" type="checkbox"/> works with others | <input type="checkbox"/> extreme cold | <input type="checkbox"/> high places |
| <input checked="" type="checkbox"/> verbal contact w/others | <input type="checkbox"/> noise | <input type="checkbox"/> fumes/odors |
| <input checked="" type="checkbox"/> face-to-face contact | <input type="checkbox"/> mechanical equipment | <input type="checkbox"/> hazardous materials |
| <input checked="" type="checkbox"/> inside | <input type="checkbox"/> electrical equipment | <input type="checkbox"/> dirt/dust |

Supervision:

Directly Supervises: 0

Indirectly Supervises: 0

Disclaimer:

The above statements are intended to describe the general nature and level of work being performed by employees to this classification. They are not intended to be construed as an exhaustive list of all responsibilities, duties and/or skills required of all personnel so classified.

Approvals:

Department Head: _____ Date: _____

Human Resources: _____ Date: _____

(Description update 1/16/2002; sent to union 1/17/2002; final 1/31/2002)

(Revised 09/26/07; sent to union 10/11/07; sent back to union 10/31/07)

(Description update 8/2/2012;

City of Burlington Job Description

Position Title: Administrator of Accounts Payable/Cash Receipts

Department: Burlington Electric Department

Reports to: Controller

Pay Grade: Level 7

Job Code: 865

Exempt/Non-Exempt: Non-Exempt

Union: IBEW

General Purpose:

This position is responsible for the administration of the Department's automated Accounts Payable system for the McNeil Generating Station accounts including all internal/external reporting, analyses, internal controls, and procedures. Also responsible for the administration of BED's automated payment processing system and coordinating with lock box processing services.

Essential Job Functions:

- Audits invoices to ensure compliance with Department Purchasing Procedures Manual and Federal Energy Regulatory Commission (FERC) System of Accounts.
- Prepares invoices for payment.
- Analyzes and audits the application of sales taxes, retainage and 1099 requirements.
- Prioritizes invoice payments to take advantage of term discounts.
- Audits the Accounts Payable month and year end closings and reports to ensure accurate recording of accruals.
- Resolves all vendor statement discrepancies.
- Prepares a variety of AP reports and analyses for other areas as requested.
- Provides backup coverage for the petty cash account.
- Develops and maintains an Accounts Payable Procedures Manual.
- Maintains McNeil Accounts Payable reports and files..
- Maintains Accounts Payable system internal controls, including but not limited to, purchase orders, invoice payment approval, receiving reports, etc.
- Responds to auditor inquiries during fiscal year end audits.
- Provides back-up coverage for Accounts Payable – Operating function.
- Processes miscellaneous customer cash payments and electronic payments as necessary.
- Prepares a timely and accurate daily bank deposit and coordinates delivery to the bank.
- Acts as primary contact with “auto debit” customers, including applications, making changes to existing information and removal of old accounts.
- Acts as liaison to banking personnel for deposits, issues with automatic debit processing, or issues with missing payments.
- Records and reconciles daily cash with billing services.
- Responds to bank, customer or employee inquiries concerning payments processed and resolves any discrepancies.

- Processes reversing entries for check and auto debit rejections (NSF's), including contacting customers to make settlement arrangements.
- Processes misdirected payments; prepares, distributes appropriate documentation.
- Reviews cash payments edit listings for appropriate account application.
- Interacts with Customer Service as needed for issues with residential commercial accounts, customer payments, and other issues including returned checks or auto debits.
- Audits and reconciles "BECS Refunds/Credits Only" account and ensures a zero balance.
- Develops and maintains a Cash Receipts Processing Procedures Manual.
- Creates and maintains cash receipts reports and files and manages its records retention program.
- Works closely with State of Vermont's Fuel Assistance program to accurately post applicable payments for mutual customers.
- Prepares annual reconciliation of Fuel Assistance program receipts.
- Maintains confidential customer bank information and fuel assistance records.
- Performs other responsibilities in the absence of co-workers and during periods of high volume as directed.
- Performs other duties as required.

Qualifications/Basic Job Requirements:

- Associate's Degree in Accounting or related field or have equivalent work experience.
- Two (2) years of relevant experience required.
- Ability to operate in a Windows based operating environment using word-processing and spreadsheet software required.
- Ability to operate a 10 key calculator required.
- Ability to organize, prioritize workflow and meet established deadlines required.
- Ability to analyze data with particular attention to detail required.
- Ability to communicate effectively both orally and in writing required.
- Knowledge of the Federal Energy Regulatory Commission (FERC) system of accounts preferred.
- Ability to recognize AP software problems and to effectively communicate to IS department and/or vendor technical support.
- Must have a high level of personal creativity, initiative and enthusiasm to work within a team environment within a constantly changing organization.
- Ability to work with minimal supervision.
- Demonstrated high level of initiative in problem solving.
- Must be consistent and accurate.
- Ability to establish and maintain positive working relationships with co-workers, customers, vendors and other personnel..

Physical & Mental/Reasoning Requirements; Work Environment:

These are the physical and mental/reasoning requirements of the position as it is typically performed. Inability to meet one or more of these physical or mental/reasoning requirements will not automatically disqualify a candidate or employee from the position. Upon request for a reasonable accommodation, the City may be able to adjust or excuse one or more of these

requirements, depending on the requirement, the essential function to which it relates, and the proposed accommodation.

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| <input checked="" type="checkbox"/> hearing/listening | <input type="checkbox"/> climbing | <input type="checkbox"/> 30 pounds |
| <input checked="" type="checkbox"/> clear speech | <input type="checkbox"/> ability to mount and | <input type="checkbox"/> driving (local/over |
| <input checked="" type="checkbox"/> touching | <input type="checkbox"/> dismount forklift/truck | <input type="checkbox"/> the road) |
| <input type="checkbox"/> dexterity | <input type="checkbox"/> pushing/pulling | |
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| <input type="checkbox"/> reading - basic | <input type="checkbox"/> math skills - basic | <input checked="" type="checkbox"/> analysis/comprehension |
| <input checked="" type="checkbox"/> reading - complex | <input checked="" type="checkbox"/> math skills - complex | <input checked="" type="checkbox"/> judgment/decision |
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| <input type="checkbox"/> shift work | <input type="checkbox"/> outside | <input type="checkbox"/> pressurized equipment |
| <input checked="" type="checkbox"/> works alone | <input type="checkbox"/> extreme heat | <input type="checkbox"/> moving objects |
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| <input checked="" type="checkbox"/> face-to-face contact | <input type="checkbox"/> mechanical equipment | <input type="checkbox"/> hazardous materials |
| <input checked="" type="checkbox"/> inside | <input type="checkbox"/> electrical equipment | <input type="checkbox"/> dirt/dust |

Supervision:

Directly Supervises: 0 Indirectly Supervises: 0

Disclaimer:

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Approvals:

Department Head: _____ Date: _____

Human Resources: _____ Date: _____

(Description update 1/16/2002; sent to union 1/17/2002; final 1/31/2002)
(Revised 09/26/07; sent to union 10/11/07; sent back to union 10/31/07)

City of Burlington Job Description

Position Title: Billing Services Coordinator

Department: Burlington Electric

Reports to: Supervisor of Customer Service

Pay Grade: Level 10

Job Code: 1022

Exempt/Non-Exempt: Non-Exempt

Union: IBEW

General Purpose:

This position is responsible for coordinating and administering electric customer billings and work order processes, and managing information concerning them. In addition, this position provides training to appropriate staff in these processes, and undertakes special projects in the customer service area.

Essential Job Functions:

- Coordinates and prepares billing and disconnection schedules in coordination with meter reading schedules.
- Prepares customer bills in compliance with Vermont Public Service Board (PSB) regulations and BED's Operating Guidelines.
- Prepares an exception listing on a daily basis.
- Organizes and processes customer information in preparation for disconnection.
- Administers adjustments and individual rate changes to customer accounts.
- Reviews and processes transfer of account credits and balances to ensure proper billing.
- Prepares audits, analysis, and justification for corrections and adjustments to customer accounts and communicates these changes to appropriate staff on a regular basis.
- Provides training and technical assistance to the Customer Services and Energy Services areas in troubleshooting customer billing and work order processing issues.
- Creates appropriate transactions and correspondence for all inactive accounts with credit balances, including refunds and transfers between accounts
- Coordinates the printing and distribution of customer electric bills to appropriate staff for mailing.
- Audits customer billing statements for accuracy including rate calculations.
- Reviews returned mail and updates customer records as necessary.
- Schedules, coordinates and mails past due and collection notices.
- Processes and maintains files on monthly write-offs of final accounts.
- Maintains detailed records and reports on all collection processes and corresponds with legal counsel, collection agencies and customers on various collections activities.
- Assists in the administration of leased light accounts, including but not limited to, entering data in customer accounts, answering related questions, etc.
- Maintains leased-light activity in the customer accounting system including data entry for installations, removals, and billing information and resolves related customer issues.
- Processes meter activity in customer accounting system, including new sets, meter exchange and

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removals.

- Balances meter inventory at the end of the month to provide totals for the monthly report.
- Reviews and assigns the rate to all new meter sets.
- Prepares daily update of billing information and audits, files and distributes reports.
- Creates other internal/external billing reports as needed.
- Documents and refines departmental billing and work order procedures.
- Develops and maintains a Billing & Work Order Procedures Manual.
- Maintains all billing reports and files and manages a records retention program.
- Institutes and maintains internal controls for the billing system.
- Responds to auditor inquiries during fiscal year end audits.
- Performs other responsibilities in the absence of co-workers and during periods of high volume as directed.
- Performs other duties as required.

Qualifications/Basic Job Requirements:

- Associate's Degree in Accounting, Business Administration or related field.
- Four (4) years of relevant experience required.
- Previous electric utility experience is preferred.
- Must be a self-starter and able to work both independently and as part of a team.
- Ability to operate in a Windows based operating environment using word-processing, spreadsheets and database software required.
- Ability to analyze data with particular attention to detail required.
- Ability to operate a 10-key pad/calculator required.
- Ability to organize, prioritize workflow and meet established deadlines required.
- Must have a high level of personal creativity, initiative and enthusiasm to work within a team environment within a constantly changing organization.
- Demonstrated high level of initiative in problem solving.
- Ability to communicate effectively both orally and in writing required.
- Ability to work well under pressure required.
- Ability to work with minimum supervision required.
- Must be consistent and accurate.
- Must be able to establish and maintain good relations with his or her co-workers.
- Must be able to listen to and appropriately react to a supervisor's constructive criticism and incorporate said criticism to improve employee performance.
- Ability to recognize billing software problems and to effectively communicate to IS department and/or vendor technical support.

Physical & Mental/Reasoning Requirements; Work Environment:

These are the physical and mental/reasoning requirements of the position as it is typically performed. Inability to meet one or more of these physical or mental/reasoning requirements will not automatically disqualify a candidate or employee from the position. Upon request for a reasonable accommodation, the City may be able to adjust or excuse one or more of these requirements, depending on the requirement, the

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| <input checked="" type="checkbox"/> face-to-face contact | <input type="checkbox"/> mechanical equipment | <input type="checkbox"/> hazardous materials |
| <input checked="" type="checkbox"/> inside | <input type="checkbox"/> electrical equipment | <input type="checkbox"/> dirt/dust |

Supervision:

Directly Supervises: 0 Indirectly Supervises: 0

Disclaimer:

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Approvals:

Department Head: _____ Date: _____

Human Resources: _____ Date: _____

(Description updated 1/16/2002; sent to Union 1/17/2002; final 1/31/2002)

(Revised 02/27/2009; sent to Union 03/06/2009)

(New revisions reflected here reviewed 08/ 21/2009 by C&ES Mgr; Reclass Review 09/14/2009; sent to Union 10/05/2009; Modifications 10/21/2009; Resent to Union 11/03/2009; BOF and CC approval.)

City of Burlington Job Description

Position Title: Billing Services Coordinator

Department: Burlington Electric

Reports to: Supervisor of Customer Service

Pay Grade: Level 10

Job Code: 1022

Exempt/Non-Exempt: Non-Exempt

Union: IBEW

General Purpose:

This position is responsible for coordinating and administering electric customer billings and work order processes, and managing information concerning them. In addition, this position provides training to appropriate staff in these processes, and undertakes special projects in the customer service area.

Essential Job Functions:

- Coordinates and prepares billing and disconnection schedules in coordination with meter reading schedules.
- Prepares customer bills in compliance with Vermont Public Service Board (PSB) regulations and BED's Operating Guidelines.
- Prepares an exception listing on a daily basis.
- Organizes and processes customer information in preparation for disconnection.
- Administers adjustments and individual rate changes to customer accounts.
- Reviews and processes transfer of account credits and balances to ensure proper billing.
- Prepares audits, analysis, and justification for corrections and adjustments to customer accounts and communicates these changes to appropriate staff on a regular basis.
- Provides training and technical assistance to the Customer Services and Energy Services areas in troubleshooting customer billing and work order processing issues.
- Creates appropriate transactions and correspondence for all inactive accounts with credit balances, including refunds and transfers between accounts
- Coordinates the printing and distribution of customer electric bills to appropriate staff for mailing.
- Audits customer billing statements for accuracy including rate calculations.
- Reviews returned mail and updates customer records as necessary.
- Schedules, coordinates and mails past due and collection notices.
- Assists in the administration of leased light accounts, including but not limited to, entering data in customer accounts, answering related questions, etc.
- Prepares daily update of billing information and audits, files and distributes reports.
- Creates other internal/external billing reports as needed.
- Documents and refines departmental billing and work order procedures.
- Develops and maintains a Billing & Work Order Procedures Manual.
- Maintains all billing reports and files and manages a records retention program.
- Institutes and maintains internal controls for the billing system.
- Responds to auditor inquiries during fiscal year end audits.

- Performs other responsibilities in the absence of co-workers and during periods of high volume as directed.
- Performs other duties as required.

Qualifications/Basic Job Requirements:

- Associate's Degree in Accounting, Business Administration or related field.
- Four (4) years of relevant experience required.
- Previous electric utility experience is preferred.
- Must be a self-starter and able to work both independently and as part of a team.
- Ability to operate in a Windows based operating environment using word-processing, spreadsheets and database software required.
- Ability to analyze data with particular attention to detail required.
- Ability to operate a 10-key pad/calculator required.
- Ability to organize, prioritize workflow and meet established deadlines required.
- Must have a high level of personal creativity, initiative and enthusiasm to work within a team environment within a constantly changing organization.
- Demonstrated high level of initiative in problem solving.
- Ability to communicate effectively both orally and in writing required.
- Ability to work well under pressure required.
- Ability to work with minimum supervision required.
- Must be consistent and accurate.
- Must be able to establish and maintain good relations with his or her co-workers.
- Must be able to listen to and appropriately react to a supervisor's constructive criticism and incorporate said criticism to improve employee performance.
- Ability to recognize billing software problems and to effectively communicate to IS department and/or vendor technical support.

Physical & Mental/Reasoning Requirements; Work Environment:

These are the physical and mental/reasoning requirements of the position as it is typically performed. Inability to meet one or more of these physical or mental/reasoning requirements will not automatically disqualify a candidate or employee from the position. Upon request for a reasonable accommodation, the City may be able to adjust or excuse one or more of these requirements, depending on the requirement, the essential function to which it relates, and the proposed accommodation.

- | | | |
|---|---|--|
| <input checked="" type="checkbox"/> seeing | <input checked="" type="checkbox"/> ability to move distances | <input checked="" type="checkbox"/> lifting (specify) |
| <input type="checkbox"/> color perception | <input type="checkbox"/> within and between | <input type="checkbox"/> 30 pounds |
| <input type="checkbox"/> (red, green, amber) | <input type="checkbox"/> warehouses/offices | <input checked="" type="checkbox"/> carrying (specify) |
| <input checked="" type="checkbox"/> hearing/listening | <input type="checkbox"/> climbing | <input type="checkbox"/> 30 pounds |
| <input checked="" type="checkbox"/> clear speech | <input type="checkbox"/> ability to mount and | <input type="checkbox"/> driving (local/over |
| <input checked="" type="checkbox"/> touching | <input type="checkbox"/> dismount forklift/truck | <input type="checkbox"/> the road) |
| <input checked="" type="checkbox"/> dexterity | <input type="checkbox"/> pushing/pulling | |
| <input checked="" type="checkbox"/> hand | | |
| <input checked="" type="checkbox"/> finger | | |

- | | | |
|---|---|--|
| <input type="checkbox"/> reading - basic | <input type="checkbox"/> math skills - basic | <input checked="" type="checkbox"/> analysis/comprehension |
| <input checked="" type="checkbox"/> reading - complex | <input checked="" type="checkbox"/> math skills - complex | <input checked="" type="checkbox"/> judgment/decision making |
| <input type="checkbox"/> writing - basic | <input checked="" type="checkbox"/> clerical | |
| <input checked="" type="checkbox"/> writing - complex | | |
| <input type="checkbox"/> shift work | <input type="checkbox"/> outside | <input type="checkbox"/> pressurized equipment |
| <input checked="" type="checkbox"/> works alone | <input type="checkbox"/> extreme heat | <input type="checkbox"/> moving objects |
| <input checked="" type="checkbox"/> works with others | <input type="checkbox"/> extreme cold | <input type="checkbox"/> high places |
| <input checked="" type="checkbox"/> verbal contact w/others | <input type="checkbox"/> noise | <input type="checkbox"/> fumes/odors |
| <input checked="" type="checkbox"/> face-to-face contact | <input type="checkbox"/> mechanical equipment | <input type="checkbox"/> hazardous materials |
| <input checked="" type="checkbox"/> inside | <input type="checkbox"/> electrical equipment | <input type="checkbox"/> dirt/dust |

Supervision:

Directly Supervises: 0 Indirectly Supervises: 0

Disclaimer:

The above statements are intended to describe the general nature and level of work being performed by employees to this classification. They are not intended to be construed as an exhaustive list of all responsibilities, duties and/or skills required of all personnel so classified.

Approvals:

Department Head: _____ Date: _____

Human Resources: _____ Date: _____

(Description updated 1/16/2002; sent to Union 1/17/2002; final 1/31/2002)

(Revised 02/27/2009; sent to Union 03/06/2009)

(New revisions reflected here reviewed 08/ 21/2009 by C&ES Mgr; Reclass Review 09/14/2009; sent to Union 10/05/2009; Modifications 10/21/2009; Resent to Union 11/03/2009; BOF and CC approval.)

City of Burlington Job Description

Position Title: Administrator of Customer and Energy Services

Department: Burlington Electric Department

Reports to: Manager of Customer and Energy Services

Pay Grade: Review of Classification

Job Code: 726

Exempt/Non-Exempt: Non-Exempt

Union: IBEW

General Purpose:

This position is responsible for providing administrative support to the Customer and Energy Services Area. In addition this position is responsible for communicating effectively with customers, contractors, department staff and others responding to information inquiries.

Essential Job Functions: (This section outlines the fundamental job functions that must be performed in this position. The "Qualifications/Basic Job Requirements" and the "Physical and Mental/Reasoning Requirements and Work Environment" state the underlying requirements that an employee must meet in order to perform these essential functions. In accordance with the Americans with Disabilities Act, reasonable accommodations may be made to qualified individuals with disabilities to perform the essential functions of the position.)

- Discusses services with customers and assists with scheduling program installations as needed and resolves specific program concerns.
- Delivers timely payment of customer incentives and contractor payments for energy efficiency program operations.
- Administers Time of Sale Ordinance communication with outside entities.
- Administers all associated purchasing, customer loan processing, implementation and verification of lease payments and accounts payable interaction.
- Assists energy efficiency program participants and field specialists with investigating electrical usage, and requesting field investigations.
- Provides accurate data entry into both PC/LAN and AS/400 computerized databases to support the effective administration of energy efficiency programs.
- Produces customer and contractor activity reports to support field services and activities.
- Enters data into and provides printed copies of spread sheet-based documents.
- Maintains a system for storing all reports and correspondence, including all filing as needed to support Customer & Energy Services program activities.
- Assists the DSM Monitoring and Evaluation Area with research, retrieval, and analysis of data on program development and progress for area reports.
- Assists with the design of administrative and marketing procedures for all energy efficiency retrofit and new construction programs and with the training of Customer and Energy Services staff.
- Resolves customer concerns not completely addressed by Customer Service

Representatives.

- Negotiates repayment agreements.
- Maintain system for repayment agreements needing daily review.
- Record and maintain files for notes used to manage customer accounts including daily review.
- Processes, maintains and coordinates bankruptcies claims, reports, and related files with BED's legal representative.
- Audit Customer Service Representative performance regarding customer turnover, Red Flag policy, etc. Report results to Supervisor of Customer Services.
- Respond to or forward as appropriate webmail from customers regarding accounts, policies, payments, etc.
- Maintain ongoing communications with the Web Presentment vendor regarding customer service and energy service modules.
- Maintain filing system for outside vendor payments from customers. Create and pay monthly invoice.
- Interfaces with other Department areas and outside entities in the administration of energy efficiency and customer service programs.
- Maintains inventory of office supplies, energy efficiency program hardware and brochures; maintains inventory database; produces inventory reports; and initiates the purchase of materials.
- Provides back-up coverage for Customer Service, Switchboard and Cashier functions as well as to the Billing Coordinator for collections & write-off activity.
- Performs analysis, corrections and adjustments to customer accounts and communicates with customers as appropriate.

Deleted: concerns to

Non-Essential Job Functions:

- Provides support to staff in program planning and implementation as needed.
- Performs other duties as required.

Qualifications/Basic Job Requirements:

- Associate's Degree in Business, Accounting or related field or equivalent experience required.
- Experience in consumer relations and/or customer service required.
- Computer skills including word processing, spreadsheet, and database management strongly preferred.
- Ability to communicate effectively, both orally and in writing required.
- Ability to make mathematical computations required.
- Demonstrated ability to organize large and complex amounts of data required.
- Ability to organize, prioritize workflow and meet established deadlines required.
- Ability to analyze data with particular attention to detail required.

Physical & Mental/Reasoning Requirements; Work Environment:

These are the physical and mental/reasoning requirements of the position as it is typically performed. Inability to meet one or more of these physical or mental/reasoning requirements will not automatically disqualify a candidate or employee from the position.

- | | | |
|---|---|--|
| <input checked="" type="checkbox"/> seeing | <input checked="" type="checkbox"/> ability to move distances within and between warehouses/offices | <input checked="" type="checkbox"/> lifting (specify) <u>40</u> pounds |
| <input type="checkbox"/> color perception (red, green, amber) | <input type="checkbox"/> climbing | <input type="checkbox"/> carrying (specify) <u> </u> pounds |
| <input checked="" type="checkbox"/> hearing/listening | <input type="checkbox"/> ability to mount and dismount forklift/truck | <input type="checkbox"/> driving (local/over the road) |
| <input checked="" type="checkbox"/> clear speech | <input type="checkbox"/> pushing/pulling | |
| <input checked="" type="checkbox"/> touching | | |
| <input checked="" type="checkbox"/> dexterity | | |
| <input checked="" type="checkbox"/> hand | | |
| <input checked="" type="checkbox"/> finger | | |
| <input type="checkbox"/> reading - basic | <input type="checkbox"/> math skills - basic | <input checked="" type="checkbox"/> analysis/comprehension |
| <input checked="" type="checkbox"/> reading - complex | <input checked="" type="checkbox"/> math skills - complex | <input checked="" type="checkbox"/> judgment/decision making |
| <input type="checkbox"/> writing - basic | <input checked="" type="checkbox"/> clerical | |
| <input checked="" type="checkbox"/> writing - complex | | |
| <input type="checkbox"/> shift work | <input type="checkbox"/> outside | <input type="checkbox"/> pressurized equipment |
| <input checked="" type="checkbox"/> works alone | <input type="checkbox"/> extreme heat | <input type="checkbox"/> moving objects |
| <input checked="" type="checkbox"/> works with others | <input type="checkbox"/> extreme cold | <input type="checkbox"/> high places |
| <input checked="" type="checkbox"/> verbal contact w/others | <input type="checkbox"/> noise | <input type="checkbox"/> fumes/odors |
| <input checked="" type="checkbox"/> face-to-face contact | <input type="checkbox"/> mechanical equipment | <input type="checkbox"/> hazardous materials |
| <input checked="" type="checkbox"/> inside | <input type="checkbox"/> electrical equipment | <input type="checkbox"/> dirt/dust |

Supervision:

Directly Supervises: 0 Indirectly Supervises: 0

Disclaimer:

The above statements are intended to describe the general nature and level of work being performed by employees to this classification. They are not intended to be construed as an exhaustive list of all responsibilities, duties and/or skills required of all personnel so classified.

Approvals:

Department Head: _____ Date: _____

Human Resources: _____ Date: _____

Revised 11/6/02; sent to union 12/13/02; final 12/30/02
Revised 09/21/2011; approved by City Council 11/14/2011
Revised & submitted to HR for review 8/22/2012;

City of Burlington Job Description

Position Title: Administrator of Customer and Energy Services

Department: Burlington Electric Department

Reports to: Manager of Customer and Energy Services

Pay Grade: Review of Classification Job Code: 726

Exempt/Non-Exempt: Non-Exempt Union: IBEW

General Purpose:

This position is responsible for providing administrative support to the Customer and Energy Services Area. In addition this position is responsible for communicating effectively with customers, contractors, department staff and others responding to information inquiries.

Essential Job Functions: (This section outlines the fundamental job functions that must be performed in this position. The "Qualifications/Basic Job Requirements" and the "Physical and Mental/Reasoning Requirements and Work Environment" state the underlying requirements that an employee must meet in order to perform these essential functions. In accordance with the Americans with Disabilities Act, reasonable accommodations may be made to qualified individuals with disabilities to perform the essential functions of the position.)

- Discusses services with customers and assists with scheduling program installations as needed and resolves specific program concerns.
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- Enters data into and provides printed copies of spread sheet-based documents.
- Maintains a system for storing all reports and correspondence, including all filing as needed to support Customer & Energy Services program activities.
- Assists the DSM Monitoring and Evaluation Area with research, retrieval, and analysis of data on program development and progress for area reports.
- Assists with the design of administrative and marketing procedures for all energy efficiency retrofit and new construction programs and with the training of Customer and Energy Services staff.
- Resolves customer concerns not completely addressed by Customer Service

Representatives.

- Negotiates repayment agreements.
- Maintain system for repayment agreements needing daily review.
- Record and maintain files for notes used to manage customer accounts including daily review.
- Audit Customer Service Representative performance regarding customer turnover, Red Flag policy, etc. Report results to Supervisor of Customer Services.
- Respond to or forward as appropriate webmail from customers regarding accounts, policies, payments, etc.
- Maintain ongoing communications with the Web Presentment vendor regarding customer service and energy service modules.
- Maintain filing system for outside vendor payments from customers. Create and pay monthly invoice.
- Interfaces with other Department areas and outside entities in the administration of energy efficiency and customer service programs.
- Maintains inventory of office supplies, energy efficiency program hardware and brochures; maintains inventory database; produces inventory reports; and initiates the purchase of materials.
- Provides back-up coverage for Customer Service, Switchboard and Cashier functions.
- Performs analysis, corrections and adjustments to customer accounts and communicates concerns to customers as appropriate.

Non-Essential Job Functions:

- Provides support to staff in program planning and implementation as needed.
- Performs other duties as required.

Qualifications/Basic Job Requirements:

- Associate's Degree in Business, Accounting or related field or equivalent experience required.
- Experience in consumer relations and/or customer service required.
- Computer skills including word processing, spreadsheet, and database management strongly preferred.
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- | | | |
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40 pounds |
| <input type="checkbox"/> color perception (red, green, amber) | <input type="checkbox"/> climbing | <input type="checkbox"/> carrying (specify)
_ _ pounds |
| <input checked="" type="checkbox"/> hearing/listening | <input type="checkbox"/> ability to mount and dismount forklift/truck | <input type="checkbox"/> driving (local/over the road) |
| <input checked="" type="checkbox"/> clear speech | <input type="checkbox"/> pushing/pulling | |
| <input checked="" type="checkbox"/> touching | | |
| <input checked="" type="checkbox"/> dexterity | | |
| <input checked="" type="checkbox"/> hand | | |
| <input checked="" type="checkbox"/> finger | | |
| <input type="checkbox"/> reading - basic | <input type="checkbox"/> math skills - basic | <input checked="" type="checkbox"/> analysis/comprehension |
| <input checked="" type="checkbox"/> reading - complex | <input checked="" type="checkbox"/> math skills - complex | <input checked="" type="checkbox"/> judgment/decision making |
| <input type="checkbox"/> writing - basic | <input checked="" type="checkbox"/> clerical | |
| <input checked="" type="checkbox"/> writing - complex | | |
| <input type="checkbox"/> shift work | <input type="checkbox"/> outside | <input type="checkbox"/> pressurized equipment |
| <input checked="" type="checkbox"/> works alone | <input type="checkbox"/> extreme heat | <input type="checkbox"/> moving objects |
| <input checked="" type="checkbox"/> works with others | <input type="checkbox"/> extreme cold | <input type="checkbox"/> high places |
| <input checked="" type="checkbox"/> verbal contact w/others | <input type="checkbox"/> noise | <input type="checkbox"/> fumes/odors |
| <input checked="" type="checkbox"/> face-to-face contact | <input type="checkbox"/> mechanical equipment | <input type="checkbox"/> hazardous materials |
| <input checked="" type="checkbox"/> inside | <input type="checkbox"/> electrical equipment | <input type="checkbox"/> dirt/dust |

Supervision:

Directly Supervises: 0 Indirectly Supervises: 0

Disclaimer:

The above statements are intended to describe the general nature and level of work being performed by employees to this classification. They are not intended to be construed as an exhaustive list of all responsibilities, duties and/or skills required of all personnel so classified.

Approvals:

Department Head: _____ Date: _____

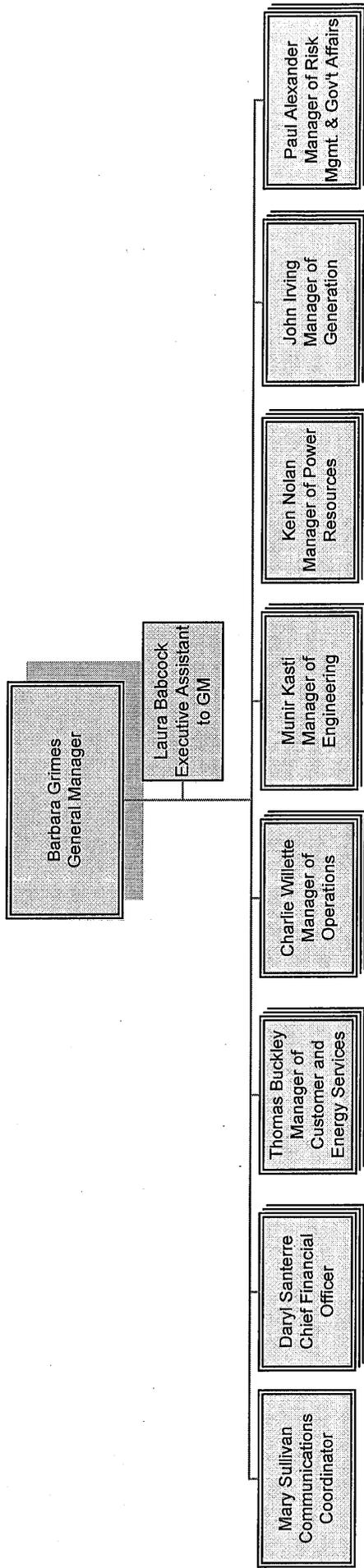
Human Resources: _____ Date: _____

Revised 11/6/02; sent to union 12/13/02; final 12/30/02

Revised 09/21/2011;

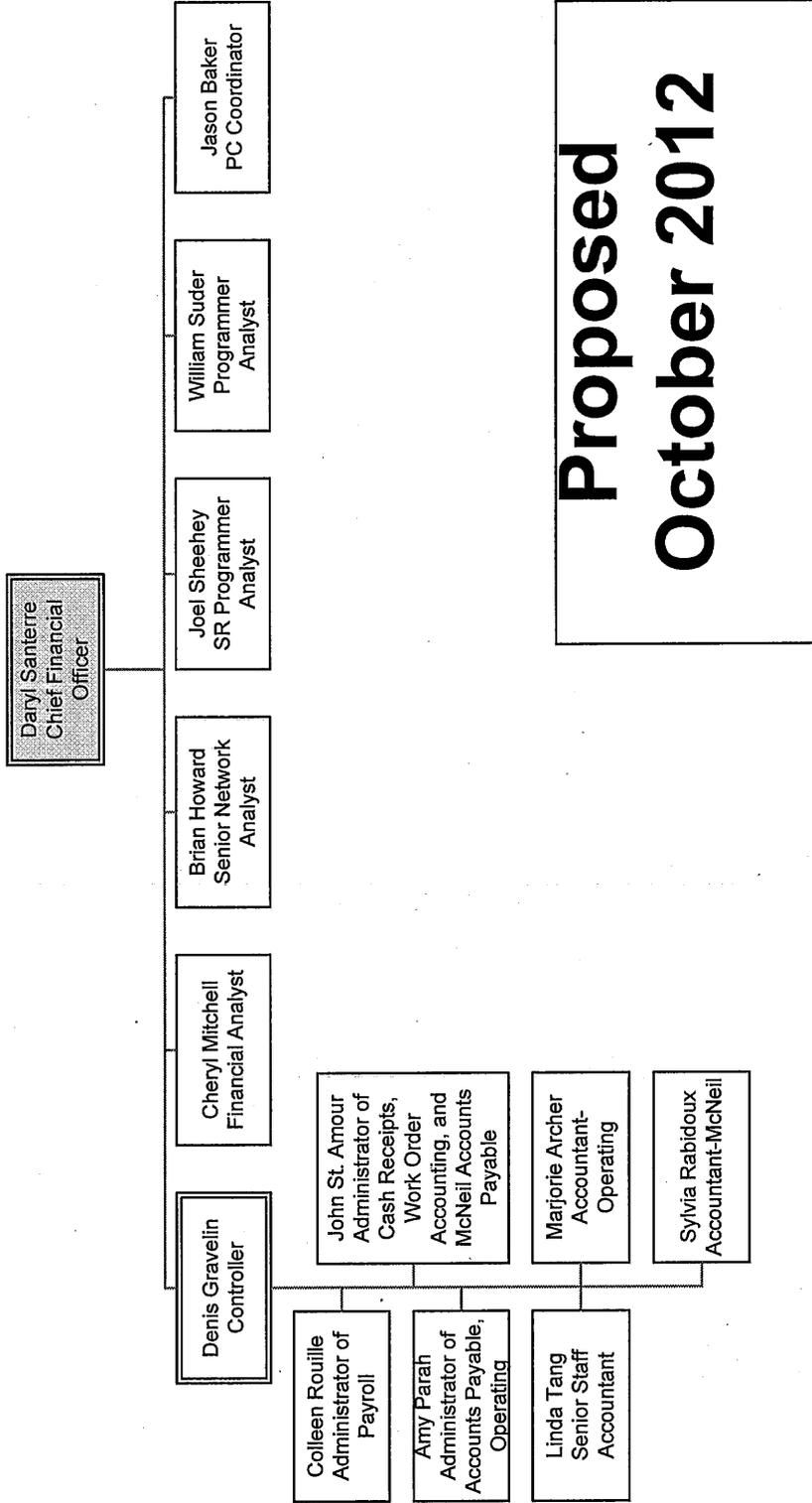
Burlington Electric Department

City of Burlington, Vermont
Organizational Chart
May 2012



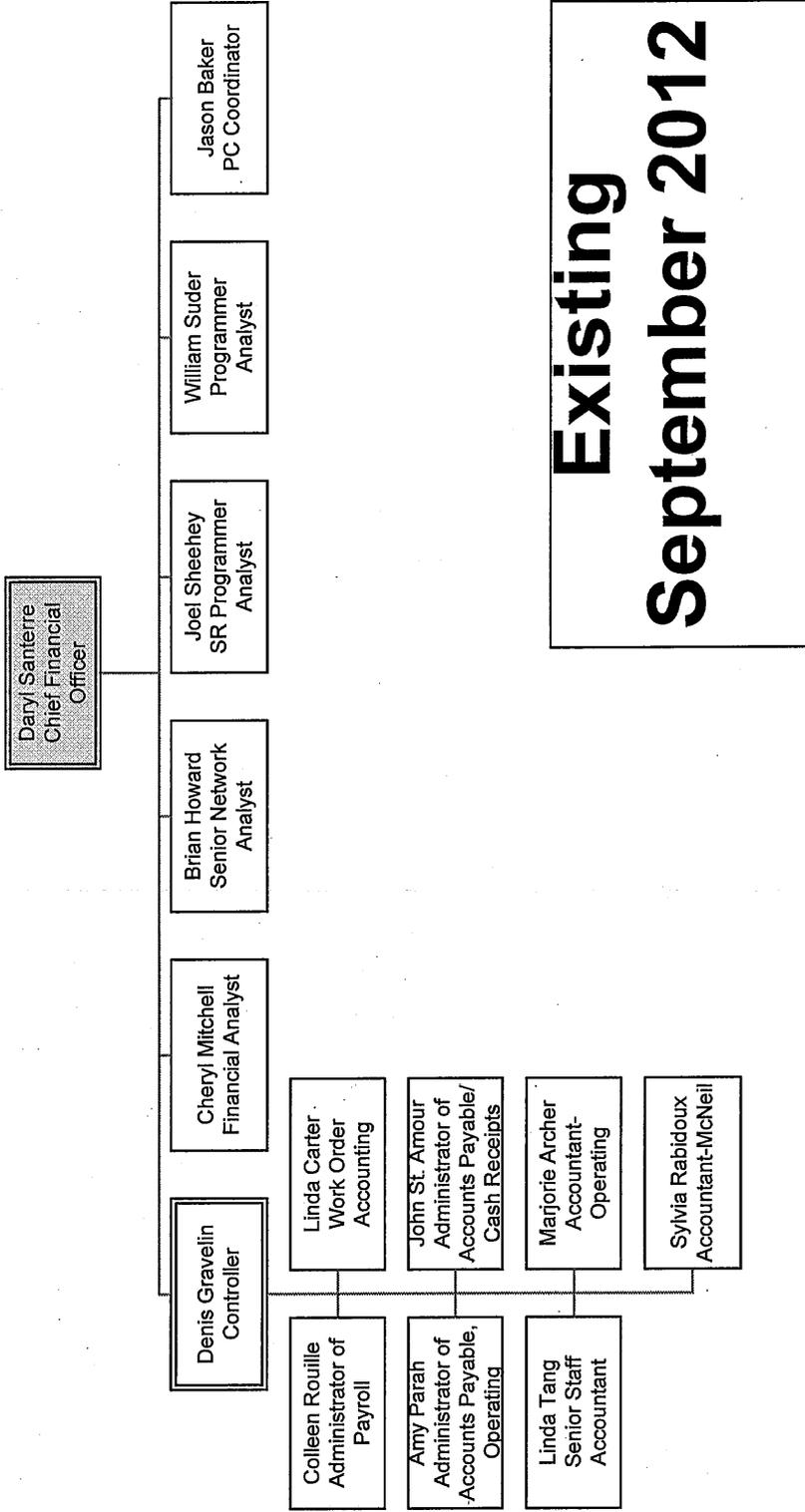
Finance & Accounting/Information Services

Burlington Electric Department



Finance & Accounting/Information Services

Burlington Electric Department



RECLASSIFICATION AND TITLE CHANGE OF THE BURLINGTON ELECTRIC
DEPARTMENT ADMINISTRATOR OF ACCOUNTS PAYABLE – CASH RECEIPTS
POSITION

In the year Two Thousand Twelve.....

Resolved by the City Council of the City of Burlington, as follows:

That WHEREAS, the General Manager of the Burlington Electric Department has requested the reclassification of the Administrator of Accounts Payable – Cash Receipts;

WHEREAS, this position was evaluated using a modified Winters Classification System and;

WHEREAS, General Manager of the Burlington Electric Department has requested the position of Administrator of Accounts Payable – Cash Receipts be re-titled; and

WHEREAS, the request has been approved and supported by the Human Resources Director and Finance Board; and

NOW THEREFORE, BE IT RESOLVED that the Burlington Electric Department Administrator of Accounts Payable – Cash Receipts position is now reclassified from Pay Level 7 to Pay Level 8 within the Modified Winter’s Classification System, effective as of the date of City Council approval; and

NOW THEREFORE, BE IT FURTHER RESOLVED that the Burlington Electric Department Administrator of Accounts Payable – Cash Receipts position is now re-titled to Administrator of Cash Receipts, Work Order Accounting, and McNeil Cash Receipts, effective as of the date of City Council approval.

Non-Exempt Position Classification Form

Position Title: Administrator of Accounts Payable etc.
 Supervisor/Manager: Don's Gavelin / Daryl Santerre
 Person(s) Completing Classification: John Irving & Ben Paay
 Date of Classification: 8-21-2012
 Reason For Classification: Revision to Existing Position New Position Other (Explain):
See attached JD - changes

Instructions:

First, assign a degree (1st, 2nd, etc.) for each compensation factor to which the position description & requirements most closely matches. Then assign a point value to each degree from the Non-Exempt Compensation Factor Point Value sheet. Total the points to determine the classification level.

Compensation Factor	Degree	Points
1. Knowledge & Experience	4	130
2. Job Complexity	2	50
3. Leadership Responsibility	N/A	10
4. Decision Making	3	55
5. Impact of Decision	2	40
6. Supervision Received	3	50
7. Contact with Customers/Public	1	10
8. Interaction with Others	3	50
9. Responsibility for Assets	2	20
10. Responsibility for Records	2	25
11. Physical Demands	1	10
12. Working Conditions/Hazards	1	5
Total Points		455
Classification Level		8

Internal Equity Review:

- Are there positions in BED with similar responsibilities & qualifications to this one? YES NO
- If yes, what are the positions (you need to list only one or two)?
Admin Acct Payable - Operaty - 7; Admin of Budget - 8, Admin W/O, Collect - 10
- Do the total points and classification for this position equal the classification for the similar positions listed above?
 YES NO
- Is this position union or non-union ? If non-union what criteria were used to determine its non-union status? --> Professional ; Confidential ; Supervisory
- If the answer to question #3 is "Yes", then the classification process is complete. If the answer is "No" then review the classification factors for this position in conjunction with factors for comparable positions and make changes where appropriate.

Final Approvals:		
Area Manager:	<u>Daryl J. Santere</u>	Date: <u>8/7/12</u>
General Manager:	<u>Paul G. Gagne</u>	Date: <u>8/9/12</u>
Human Resources:	<u>Ben Paay</u>	Date: <u>9/10/12</u>