

ORCAS POWER AND LIGHT COOPERATIVE
JOB DESCRIPTION: Member Services Representative

Reports To: Member Services Supervisor	Department: Member Services
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General Statement of Duties

This is a bargaining unit position. Member Services Representatives are non-supervisory positions; Lead Member Services Representative may have supervisory responsibilities in the absence of the Member Services Supervisor. Each position is responsible for acting as a primary point of contact with members, staff, and vendors for all functions related to the member cycle of service.

Primary Function

Within the guidelines for Member Services Progression (as defined in this job description), the Member Services Representative is responsible for all assigned areas of billing and accounts receivable, including (but not limited to): receiving and recording daily cash collections; receiving and directing visitors; answering inquiries and complaints on the telephone and at the reception counter; operate and input member information into the computer system; preparation of monthly bills, disconnect notices and reports; and processing periodical notices and reports as needed.

Level of Authority

Performs duties with varying degrees of supervision, depending on experience and complexity of task. Supervision for the Member Services Representative in Entry to Step 2 of the Member Services Progression will be close to moderate. Member Service Representatives at Step 3 is expected to organize workload to established deadlines and to perform routine assignments independently following standard practices and established procedures, with minimal supervision. All Member Service Representatives report to the Member Services Supervisor.

Work Environment

Work is performed primarily in an office setting at either Eastsound or Friday Harbor, depending on assignment, and the Member Services Representative may be required to travel to other islands to perform assigned tasks. The work is subject to extensive public contact. Individuals must exercise excellent customer service skills. Individuals may be subject to stressful situations.

Generally, once the employee has completed the Entry Level of the Member Service Representative Step Progression, each subsequent step will require a minimum of twelve (12) months before the employee is eligible to move to the next step.

While working to increase a step, if the training is requested by the employee, the training will

be given a timeline, and given when feasible.

Essential Job Functions

- ☐ Process member bills, credit, and collection data daily using utility specific software;
- ☐ Process incoming cash for the cooperative;
- ☐ Respond to outages and major events as directed by management;
- ☐ Maintain knowledge and application of all electric rate schedules;
- ☐ Maintain knowledge of the tariff and other related credit procedures;
- ☐ Assist members with questions regarding billing or collection issues;
- ☐ Maintain knowledge of OPALCO e-bill customer portal including questions on auto-pay via credit card or electronic check;
- ☐ Provide members with web browser assistance for retrieval of information via the internet;
- ☐ Ensure accurate and timely responses to member inquiries.

Required Knowledge, Skills and Abilities

- ☐ Ability to use all general office equipment, such as, but not limited to: copier, fax, ten-key, cash register, telephone, computer, cellular telephone, and two-way radio;
- ☐ Ability to maintain confidential information;
- ☐ Ability to work independently with daily activities;
- ☐ Ability to complete job tasks following specific procedures and instructions;
- ☐ Possess excellent organizational skills with strong attention to detail;
- ☐ Possess excellent oral and written communication skills. Individuals should be clear, concise, and professional;
- ☐ Ability to interact with members, and the general public, in a tactful and professional manner in all situations while maintaining control of the situation; individuals should have a courteous, positive, and empathetic attitude;
- ☐ Ability to use proper business English, spelling and punctuation;
- ☐ Ability to communicate effectively, both orally and in writing, and understand and follow verbal or written instructions;
- ☐ Possess superior interpersonal skills. Ability to relate with members in a courteous and tactful manner. Ability to establish effective working relationships with co-workers, managers, members and the general public;
- ☐ Ability to prioritize and manage tasks with frequent interruptions.
- ☐ Ability to file, maintain records, prepare reports and uphold confidentiality.

- ☐ Ability to effectively interact with all other employees in a professional manner.

Acceptable Experience and Training

- ☐ Minimum two years relevant experience in a business environment;
- ☐ Minimum two years relevant customer service experience;
- ☐ Experience using computers, word processing, spreadsheet, and a variety of communication software.
- ☐ Experience handling and balancing a cash drawer.

Required Special Qualifications
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- ☐ High school graduate or equivalent.
- ☐ Must possess a current Washington State Driver's License.

Essential Physical Abilities

- ☐ Sufficient physical strength, with or without reasonable accommodation, to lift and carry boxes or parcels up to approximately 40 pounds;
- ☐ Sufficient clarity of speech and hearing, with or without reasonable accommodation, which permits the employee to communicate well with members and other employees, in person or over the telephone and radio;
- ☐ Sufficient vision, with or without reasonable accommodation, which permits the employee to work at a computer terminal six to eight-hours per day.
- ☐ Sufficient manual dexterity, with or without reasonable accommodation, which permits the employee to operate a computer keyboard, ten key calculator and other standard office equipment.

Distinguishing Characteristics

- ☐ Knowledge of OPALCO personnel, department and services.
- ☐ Ability to work with independence and continuity.
- ☐ Ability to quickly respond to a wide variety of complex accounting, billing and member service inquiries. Ability to read, understand and apply rules, regulations, policies and procedures.
- ☐ Knowledge of utility billing procedures.
- ☐ Experience working in a cooperative business environment.
- ☐ Experience working in a bargaining unit environment.

ORCAS POWER AND LIGHT COOPERATIVE Member Services Progression

MEMBER SERVICES REPRESENTATIVE STEP PROGRESSION

ENTRY LEVEL – 85%

Six months probationary period

During the six-months' probationary period, the employee is encouraged to work on acquiring the skills necessary to progress to the next step level. Informal evaluations will be given throughout the first six months, with a formal evaluation being done at the end of the six-months' probationary period.

The evaluations will be based on the employee's general abilities and skills, attitude, attendance and punctuality, customer relations and the ability to multi-task. Employee must be able to improve in areas identified during the evaluations given by supervisor and management.

- Greet members at the counter in a professional manner.
- Monitor and operate radio; respond to "mayday" calls.
- Professionally answer and direct internal and external telephone calls.
- Assist with unscheduled outages when needed.
- Operate all office equipment.
- Update basic customer information and begin using utility-specific software.
- Receive and process payments.
- Balance cash drawer daily and cash sheet.
- Daily errands in company vehicle (bank, post office, etc.).
- Basic understanding of OPALCO rates, policies, and procedures.
- Set-up customer payment arrangements.
- Attend and participate in the OPALCO annual meeting and San Juan County Fair.

STEP 1 – 90%

Must have completed six months' probationary period and completed or demonstrated competency in the following:

- Explain basic billing inquiries.
- Extensive understanding of OPALCO rates, policies, and procedures.
- Process new membership applications.
- Process transfer/reconnect/disconnect service orders.
- Obtain First Aid/CPR certification.
- Maintain and balance petty cash.
- Process non-pay disconnects.
- Process penalty procedure.
- Work final bill collections.

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STEP 2 – 95%

Must have completed or demonstrated competency in the following:

- Understand and assist in planned outage procedures.
- Process simple revenue adjustments less than \$50.
- Troubleshoot complex member inquiries.
- Process member communications using an automated system.
- Set up, analyze, and process basic pre-bill reports

STEP 3 – 100%

Must have completed or demonstrated competency in the following:

- Process member refunds.
- Process meter exchanges.
- Set up new accounts and maintain special rates (Net Metering, Time of Use, etc.).
- Set-up, analyze, and process all pre-bill reports.
- Process monthly billing.
- Process revenue adjustments less than \$200.
- General expertise in customer information system.

DocuSigned by:
Approved: Foster Hildreth Date: 2/16/2021
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Foster Hildreth, General Manager

Approved: Nichole Reedy Date: 2.16.2021
Nicole Reedy, Union Business Agent