



**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT (METRO)
PERSONNEL/HUMAN RESOURCES STANDING COMMITTEE AGENDA
REGULAR MEETING
NOVEMBER 9, 2018 – 10:30AM
METRO ADMIN OFFICES
110 VERNON STREET
SANTA CRUZ, CA 95060**

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MEETING TIME: 10:30AM

NOTE: THE COMMITTEE CHAIR MAY TAKE ITEMS OUT OF ORDER

- 1 CALL TO ORDER**
- 2 ROLL CALL**
- 3 ADDITIONS/DELETIONS FROM AGENDA/ADDITIONAL DOCUMENTATION TO SUPPORT EXISTING AGENDA ITEMS**
- 4 ORAL AND OTHER COMMUNICATIONS TO THE PERSONNEL/HUMAN RESOURCES STANDING COMMITTEE**

This time is set aside for Directors and members of the general public to address any item not on the Agenda, but which is within the matter jurisdiction of the Committee. Each member of the public appearing at a Committee meeting shall be limited to three minutes in his or her presentation, unless the Chair, at his or her discretion, permits further remarks to be made. Any person addressing the Committee may submit written statements, petitions or other documents to complement his or her presentation. When addressing the Committee, the individual may, but is not required to, provide his/her name and address in an audible tone for the record.
- 5 RECOMMEND TO THE BOARD OF DIRECTORS THE CPS HR CONSULTING SEIU CLASSIFICATION STUDY, NEW POSITIONS DESCRIPTIONS AND TOTAL COMPENSATION METHODOLOGY**
- 6 ADJOURNMENT**

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DATE: November 9, 2018
TO: Personnel/HR Standing Committee
FROM: Angela Aitken, CFO and Acting HR Director
SUBJECT: RECOMMEND TO THE BOARD OF DIRECTORS THE CPS HR CONSULTING SEIU CLASSIFICATION STUDY, NEW POSITIONS DESCRIPTIONS AND TOTAL COMPENSATION METHODOLOGY

I. RECOMMENDED ACTION

That the Personnel/HR Standing Committee recommend to the Board of Directors the CPS HR Consulting SEIU Classification Study, new positions descriptions and total compensation methodology

II. SUMMARY

- An SEIU Classification and Total Compensation Study was conducted at the Santa Cruz Metropolitan Transit District (METRO), and was needed due to outdated job descriptions, salary range compaction issues, and a desire to attract and retain valuable personnel.
- CPS HR Consulting (CPS) was awarded the contract to conduct this SEIU study in August 2018.
- The study was broken down into two stages:
 1. Job Analysis, which included job specification updates and revisions
 2. Total Compensation analysis
- Between August 2018 and November 2018, CPS and METRO staff engaged in position description questionnaires (PDQs), interviews and activities to determine what changes were needed to update existing and outdated job descriptions.
- In November 2018, METRO received CPS's SEIU Classification Study Report, which included revised job descriptions for the SEIU staff positions.
- METRO and SEIU are still meeting and conferring on the new position descriptions at this time.
- Staff recommends that the Committee recommend to the Board of Directors the CPS SEIU Classification Study Report and position descriptions in concept, due to METRO and SEIU continuing to meet and confer on the position descriptions.
- Further, per the side letter with SEIU, dated May 10, 2017, staff also recommends that the Committee recommend to the Board a total compensation philosophy (methodology) for the compensation portion of the

CPS Classification and Total Compensation Study, which methodology is consistent with the methodology supported by the Board for the previous management compensation analysis.

III. DISCUSSION/BACKGROUND

In order to attract and retain talented professionals, both public and private sector organizations periodically perform a comprehensive classification and total compensation review. Such a review helps the organization understand where its pay scales are, relative to pay scales for similar positions, as well as other employee benefits and compensation. For SEIU, reclassifications have been performed every six (6) months per the SEIU MOU, Articles 8.2 and 8.7. Per the side letter dated May 10, 2017, METRO and SEIU have agreed to suspend Articles 8.2.3 and 8.7.1 until June 30, 2023, and have a Classification and Total Compensation Study performed for SEIU bargaining unit by December 31, 2018.

In August 2018, the Board of Directors approved to award the SEIU Classification and Total Compensation Study contract to CPS. The scope for this study was to conduct a comprehensive classification and total compensation study to include:

- A review of all seventy-seven (77) SEIU classifications and one hundred thirty-two (132) positions under the SEIU MOU;
- A classification structure that is easily understood, with current job descriptions where distinctions between classifications are clearly identified and individual positions are allocated to the correct classifications.
- A sustainable total compensation system that is competitive in the marketplace, internally equitable, and integrated with the classification structure.

Between August 2018 and November 2018, CPS and METRO staff engaged in activities to determine what changes were needed to update existing and outdated job descriptions. During this process, each staff member completed a PDQ, which was followed by an interview by CPS staff, if needed. CPS then reviewed the stated duties and responsibilities of each position and created a classification structure, which included revising job titles that are easily understood, current job descriptions where distinctions between classifications are clearly identified, and individual positions are allocated to the correct classifications.

Ensuring proper classification identification is an imperative aspect of a classification study, as conducting accurate total compensation analysis is reliant on accurate job classifications and descriptions.

The outcomes of the interviews, PDQs, and structure review activities will be used to create a revised organizational chart, revised job classifications, and the associated job descriptions. The final step of the Classification Study is for staff to review the final job classification descriptions, and then meet and confer with SEIU on the resulting position descriptions.

The SEIU Classification report and corresponding position descriptions will be used for the Total Compensation phase of the study.

The Total Compensation phase will include:

- Reviewing the ten (10) agreed upon labor markets, making recommendations as appropriate, and conducting a total compensation survey of benchmark classifications to be surveyed within METRO's designated labor markets. The following are the agreed upon labor market agencies for comparison to SEIU classifications:
 - Alameda-Contra Costa Transit District (AC Transit) – non-peer
 - Central Contra Costa County Transit Authority
 - City of Santa Cruz
 - County of Santa Cruz
 - Golden Gate Transit District non-peer
 - Monterey-Salinas Transit District
 - Riverside Transit Agency
 - San Joaquin Regional Transit District
 - Santa Barbara Metropolitan Transit District
 - Santa Clara Valley Transportation Authority (VTA) – non-peer
- Recommending a methodology development of a comparables market analysis included collecting salary and benefits data on comparable positions from the labor market comparable agencies at market median, 5% below market median, and 5% above market median, of which 5% below market is being recommended for use in METRO's internal equity process for SEIU. The methodology of 5% below median is recommended since the ten (10) comparable agencies include three (3) non-peer, very large transit agencies.
- A recommended salary structure will be developed to achieve market competitiveness and internal equity with a rationale for placement of classifications within the structure.

Staff recommends that the Committee recommend to the Board of Directors the CPS SEIU Classification Study Report, job classifications (title changes), and

position descriptions in concept, due to METRO and SEIU continuing to meet and confer on the position descriptions until 11:30am on Friday, November 9, 2018. Furthermore, Staff recommends proceeding with a total compensation philosophy (methodology) of 5% below market for the total compensation portion of the CPS SEIU Classification and Total Compensation Study.

IV. FINANCIAL CONSIDERATIONS/IMPACT

The base value previously awarded by the Board of Directors for this contract was \$41,900 to complete the Management Classification and Total Compensation Study. The project is within budget and scope. No project overruns are anticipated.

The option to conduct an SEIU Classification and Total Compensation Study was exercised, as presented with the award of this contract, with the additional cost for SEIU proposed to be \$60,688.

Funds to support this contract are included in the Administration Department FY18 & FY19 Prof/Technical Fees (503031) Operating budget.

V. ALTERNATIVES CONSIDERED

- Do not recommend the CPS SEIU Classification Plan and Total Compensation Methodology. This is not recommended, as METRO's outdated job specifications and salary range compression issues affect the agency's ability to attract and retain valuable personnel.

VI. ATTACHMENTS

Attachment A: SEIU side letter of agreement – dated May 10, 2017

Attachment B: CPS SEIU Classification Study - dated October 30, 2018

Attachment C: CPS SEU Position Descriptions - as of October 29, 2018

Note: A full copy of the Contract is available on request.

Prepared by: Angela Aitken, CFO and Acting HR Director

VII. APPROVALS:

Angela Aitken, CFO and Acting HR Director Angela Aitken

Alex Clifford, CEO/General Manager Alex Clifford

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Attachment A

Side Letter of Agreement: Contract Extension and Modification – as of 05/10/17

Except as specifically provided for below, all other remaining terms and conditions as provided in the Memorandum of Understanding between the Santa Cruz Metropolitan Transit District and the Service Employees International Union – Local 521 for the term of July 1, 2012 through and including June 30, 2015 shall remain in full effect. This Side Letter of Agreement is subject to ratification by the Union membership and approval of the Board of Directors of Santa Cruz METRO.

ARTICLE 8 PERSONNEL ACTIONS

1a) 8.2 Classification Actions

It is agreed that Sec 8.2.3 will be suspended, as of the signing of this agreement, through June 30, 2023.

~~8.2.3 Beginning with the month of December 2001 and annually thereafter, management agrees to conduct three salary surveys on benchmark classifications not listed in Article 8.5.1 or one group defined as the class specifications used to determine a career ladder grouping as listed in Article 8.5.1 as recommended by the Union. The salary survey results shall be completed within six (6) months and reviewed by the Union. The General Manager's decision shall be made within thirty days of receipt and be final unless he/she recommends an adjustment to the Board. The Union may not recommend the same classification or group during the term of this MOU.~~

1b) 8.7 Reclassification

It is agreed that Sec 8.7.1 will be suspended, as of the signing of this agreement, through June 30, 2023.

~~8.7.1 During the month of December, the first three (3) employees whose class specification is not included in any career ladder grouping (as listed in Article 8.5.1), and one group in a class, who submit to the Human Resources Manager a completed request form for reclassification, will be studied. During the month of June the first three (3) employees whose class specification is not included in any career ladder grouping (as listed in Article 8.5.1), who submit to the Human Resources Manager a completed request form for reclassification, will be studied.~~

~~During the month of December the Union can request a reclassification study of one group defined as the class specifications used to determine a career ladder grouping (as listed in Article 8.5.1). The Human Resources Manager will acknowledge receipt of the request within ten (10) working 24 days. An employee may not resubmit a second request while in the same classification for reclassification more than once within a two (2) year period after being studied. The employee and the Union may not resubmit a second request for a reclassification more than once within a two (2) year period after being studied. This provision shall not prohibit management from having additional positions studied other than those submitted by an employee or the Union.~~

~~Management shall provide a written notification to the Union on requested reclassifications including wage comparisons and recommendations. Classification adjustments for Union-~~

Attachment A

Side Letter of Agreement: Contract Extension and Modification – as of 05/10/17

~~initiated group reclassifications shall become effective on the first day of the first pay period following approval by the Board of Directors. Employee requested studies that result in being reclassified to a new or revised classification and result in a wage increase shall be effective not later than the first day of the first pay period of the following July 1 (December request) or January 1 (June request) of each year. However, the implementation of an upward wage increase may be delayed by the number of days beyond thirty (30) that it takes the employee to complete and submit the position information questionnaire form. Up to six (6) hours of the employee's work time will be provided for this task. Failure to complete the form within sixty (60) days will cancel the employee requested study.~~

Note: It is the intent of the parties to suspend Sec 8.2.3 and Sec 8.7.1 until June 30, 2023, and have a Classification and Total Compensation Study performed for the SEIU bargaining unit by December 31, 2018.

2) Santa Cruz METRO will perform a Classification and Total Compensation Study for the SEIU bargaining Unit by December 31, 2018.

The following public Agencies ("comparable Agencies") will be used to gather comparative compensation data for the Classification and Total Compensation Study performed by December 31, 2018:

1. Alameda-Contra Costa Transit District
2. City of Santa Cruz
3. Central Contra Costa County Transit Authority
4. County of Santa Cruz
5. Golden Gate Transit District
6. Monterey-Salinas Transit District
7. Riverside Transit Agency
8. San Joaquin Regional Transit District
9. Santa Barbara Metropolitan Transit District
10. Santa Clara Valley Transportation Authority

The above ten (10) agreed upon comparable Agencies will be studied for the purposes of the Classification and Total Compensation Study to be completed by December 31, 2018 only. The use of the above comparable Agencies is non-precedential.

All parties agree that the Classification and Total Compensation Study to be completed by December 31, 2018 will be performed as a Total Compensation study. Total Compensation means that the study will include all compensation an employer provides to an employee, including all wages and benefits.

Attachment A

Side Letter of Agreement: Contract Extension and Modification – as of 05/10/17

ARTICLE 10 PAY RATES

3) 10.1 Pay Rates

Pay rates for represented classes are shown in Appendix A – Salary Schedules, and are modified pursuant to the following:

An increase of 0% shall be effective June 14, 2018

Note: It is the intent of the parties to receive no pay increase effective June 14, 2018. See Appendix A – Salary Schedules effective June 14, 2018.

ARTICLE 13 PAID LEAVES

4) 13.2 Annual Leave

It is agreed that Sec 13.2.1 will be amended effective July 1, 2017.

13.2.1 An employee shall accrue paid annual leave in lieu of vacation leave or holiday with the exception of 13.3.1 based on the following hours of active service (defined in section 10.9 Salary Schedule Step Advancement):

Hours of Service	Hourly Accrual Rate	Approximate Days Annually
1 – 10,399	0.0846	22
10,400 – 20,799	0.1116	29
20,800 – 31,199	0.1231	32
31,200 +	0.1308	34

Note: It is the intent of the parties to rescind one day of annual leave accrual from each member's accrual rate effective July 1, 2017.

ARTICLE 23 TERM

5) This contract extension and modification shall commence on **May 19, 2017**, and shall expire on **June 30, 2019**.

Note: It is the intent of the parties to modify the terms of the current agreement set to expire June 30, 2018.

Side Letter of Agreement: Contract Extension and Modification – as of 05/10/17


This agreement is entered into by the Service Employees International Union, Local 521 and the Santa Cruz Metropolitan Transit District on May 19, 2017, and is executed on behalf of the parties by the following representatives:

Santa Cruz Metropolitan Transit District


Service Employees International Union, Local 521



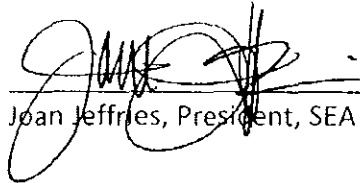
Alex Clifford, CEO

 5/18/17

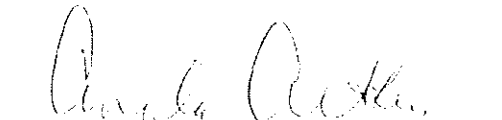
Olivia Martinez, Lead Internal Organizer



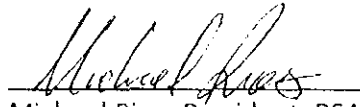
Ciro Aguirre, COO

 5/18/17


Joan Jeffries, President, SEA Chapter



Angela Aitken, Fin Mgr & Interim HR Mgr

 5/18/17

Michael Rios, President, PSA Chapter



Antonio Castillo, President, VMU Chapter

Private and Confidential

Santa Cruz Metropolitan Transit District

SEIU Classification Study

Draft Classification Report

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Attachment B

Santa Cruz Metropolitan Transit District
SEIU Classification Study
Draft Classification Study Report

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*Santa Cruz Metropolitan Transit District
SEIU Classification Study
Draft Classification Study Report*

I. Background

The Santa Cruz Metropolitan Transit District (METRO) retained CPS HR Consulting (CPS HR) to conduct a classification study and total compensation survey of METRO's bargaining units represented by the Service Employees International Union (SEIU). The stated objective of the study was to perform a comprehensive analysis of METRO's current classification and compensation plans for all included study positions, and to provide appropriate classification and compensation recommendations reflective of the work performed and the market value for such work.

The scope of the classification study encompassed 77 classes; a total of 132 positions were identified by METRO staff for individual review and analysis. A list of all classes included in the study is included as [Appendix A](#).

This Draft Classification Study Report outlines the results of the **classification** study. The classification study results are intended to assist METRO in identifying any positions that are inappropriately classified and to support the selection of appropriate benchmark classes for the forthcoming **total compensation** study, which will be provided under separate cover.

II. Classification Study Methodology

Consistent with the study goals provided by METRO, CPS HR identified and accomplished several specific work plan tasks as described below.

Review of METRO Background Materials

In order to initiate the classification study, CPS HR met with the METRO project coordinator to review and finalize the study plan. CPS HR also requested and obtained various documents from METRO, including current classification specifications, salary schedules, position allocations and the most current organizational chart. These documents enabled CPS HR to become familiar with the current organizational/classification structure and provided the framework for understanding the subsequent information to be collected.

Position Description Questionnaires

To gather information on all of the positions included in the study, CPS HR developed a customized Position Description Questionnaire (PDQ) designed to gather comprehensive information about each position including: essential job functions; required knowledge, skills, and abilities; supervision given and received; minimum job qualifications; decision-making responsibility; authority; and physical/mental job requirements. The PDQ form, including instructions for completion, was provided to METRO for distribution to all the study incumbents. CPS HR also requested that a PDQ be completed for any vacant positions that METRO wished to include in the study. A copy of the PDQ form used for this study is provided in [Appendix B](#).

In completing the PDQs, incumbents were instructed to provide information based on their current job responsibilities. They were advised that group PDQs could be submitted if all incumbents in the group performed essentially the same duties and reported to the same supervisor. Upon completion of their portion of the PDQ, incumbents were instructed to submit the document to their supervisor for review and comment. After completing the supervisor section, the PDQ was forwarded to the manager for review and comment. This process is designed to ensure the information provided by incumbents is accurate and complete. All completed PDQs were returned to the METRO project coordinator then forwarded to CPS HR.

The PDQs were initially provided to METRO in September of 2018 and returned to CPS HR on October 5, 2018. Upon receipt, CPS HR thoroughly reviewed each PDQ to analyze the duties and responsibilities assigned to each position and compared them to METRO's current class specifications. This initial review allowed CPS HR to identify positions in which incumbents might be working out of class or positions requiring employee and/or manager interviews in order to obtain additional information. A proposed interview schedule was provided to the METRO project coordinator.

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Incumbent Interviews

CPS HR conducted individual and group interviews on October 19-20, 2018 at the METRO offices in Santa Cruz and also conducted two additional interviews by phone the following week. A total of 21 employees and 8 managers were interviewed, representing 18 classes (approximately 30% of encumbered classes).

The purpose of the interviews was to assist CPS HR in gathering additional information about the job duties and responsibilities associated with each position, and to provide the incumbents an opportunity to explain any comments made on the PDQ that were unclear or inconsistent with the current class of the position. Where possible, group interviews (with a maximum of four participants) were conducted to obtain maximum employee input. Interviews were also scheduled with all of the current department managers to confirm and/or clarify their perspective on various positions.

Classification Data Analysis

The information provided through the PDQs and interviews was utilized to determine the degree to which METRO's current class specifications describe the actual work being performed by the incumbents. The information was also used to develop new or revised draft proposed class specifications and to properly allocate positions based on a proposed classification structure. CPS HR also used the information to identify broad job families as appropriate.

Class Specification Revision and Development

The METRO project coordinator requested that CPS HR utilize a new class specification format for all proposed classes. The project coordinator also stated that it would **not** be necessary for CPS HR to "track" changes using METRO's current specifications but instead requested that CPS HR prepare an entirely new set of specifications, each to include the following:

- **The recommended title for the class.** Some of the classes proposed by CPS HR retained the same titles as the current METRO titles, whereas others have been "retitled" based on the consultants' recommendations. Recommendations were based on common and "best practice" titling for such classes. In a small number of cases, CPS HR has recommended the development of new classes (and new titles) and the abolishment of current METRO classes. A "crosswalk" showing the relationship between the current and proposed class titles is provided in [Appendix A](#).
- **The proposed bargaining unit for the class.** CPS HR recommended bargaining unit assignments consistent with the way that current METRO classes are assigned, with the understanding that final bargaining unit assignment may be a collective bargaining matter.
- **An overview of the class definition.** This includes the level of supervision received.
- **Distinguishing characteristics of the class.** This includes criteria to be used when comparing the subject class to other classes above and below in the same series.

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*Santa Cruz Metropolitan Transit District
SEIU Classification Study
Draft Classification Study Report*

- **Examples of typical duties and responsibilities typical for positions in the class.**
- **The knowledge and abilities required to do the work.**
- **Recommended minimum qualifications required of job applicants.** In discussing the preferred formatting for this section of the specifications, the METRO project manager requested the addition of a “blanket” statement to all of the specifications, which states that any combination of experience and education that would likely provide the required knowledge and abilities is qualifying.
- **Brief summaries regarding the physical and mental demands of the job, as well as the work environment.** These are designed to comply with the Americans with Disabilities Act (ADA).
- **The job family designation as recommended by CPS HR.**

The format requested by METRO also includes the class code and the overtime status—exempt or non-exempt based on Fair Labor Standards Act (FLSA) criteria—of the class. CPS HR did not identify class codes on the draft class specifications since it is unclear whether those will change because of the study. Likewise, CPS HR did not include FLSA determinations on the draft proposed class specifications pending further discussions with METRO regarding the defensibility of various approaches to making such determinations.

Delivery of Draft Class Study Documents

A complete set of draft proposed class specifications was delivered to the METRO project coordinator on October 29, 2018, along with a basic list matching METRO’s current class titles to those of the proposed specifications. This Draft Classification Report is being provided to METRO separately for review and comment.

III. Conceptual Framework

This section of the report presents a conceptual framework for the classification plan proposed for METRO. The classification analysis, as applied to positions that were included in this study, relies upon sound principles of job evaluation and job analyses. The approach identifies distinct differences in levels and types of work determined by using established allocation factors and class concepts.

Classification Concepts and Principles

A position classification plan is a critical human resources tool. It describes the basic personnel framework within an organization and defines the standards and concepts that are used to maintain and/or change that framework. It serves as the basis for organizing job assignments, developing job announcements, recruiting employees, evaluating qualifications for the job, developing methods for assessing performance, and identifying and making changes in the organizational structure of the organization. It also provides the basic foundation for establishing a compensation plan. Thus, the classification plan impacts virtually every phase of the employment process.

Position classification is a dynamic process since the plan itself and the class specifications must continually respond to the changing needs of the organization. Thus, regular and periodic review of the plan is needed to ensure that it accurately reflects changes in the agency's organizational goals, organizational structure, policy, size and leadership styles. The plan must also respond to changes in technology, programs, legal requirements and characteristics of the workforce.

Once established, the classification plan must be utilized consistently to serve its purpose as a management tool. If employment decisions are not consistent with the plan, then either the plan or the decisions must be amended to be consistent with each other.

Basic Classification Guidelines

Position, Class, Series and Job Family

A **position** represents a group of duties and responsibilities performed by one employee. In contrast, **class** refers to a position or a group of positions that are sufficiently similar in duties and responsibilities that they may be treated the same for purposes of pay, general minimum qualifications, title and a variety of other administrative activities.

A class **series** may be established when two or more classes are related to each other in a linear or related fashion. Typically, classes may be placed in a series when the work performed in the classes is similar in nature but not in level, and when the work performed at the lower level class helps develop the knowledge, skills and abilities to perform work at the higher level. It should be noted, however, that the ability of an individual incumbent to promote from the lower level to the higher level class in a series may still be limited by the availability of a vacant position, unless positions are "flexibly staffed" (see discussion later in this report).

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A **job family** is a group of classes and/or class series that are closely related. Classes in a job family usually have similarities in their employment requirements that may support career progression. However, classes in the same job family may still require different levels of education, experience, skill, effort, or responsibility. For example, a financial job family may include clerical, technical, professional/analytical, supervisory and management classes.

Definition of Classification and Allocation

Classification is the process of identifying and describing the various kinds of work in an organization and grouping similar positions together under the same common job title. **Allocation** is more specifically tied to the placement and/or budgeting of positions within an organization. Thus, a recommendation to allocate a position within an organization is based on the results of the classification analysis for that position.

It is easy to see that several positions belong to the same class when the duties are identical. In practical application, however, the duties and responsibilities of positions do not need to be identical to be placed in a common class. Instead, classification plans generally place positions into classes based on a determination of “sufficient similarity”. Within an individual organization, “sufficient similarity” can be broadly or narrow interpreted. A broad interpretation recognizes positions that share a core set of classification factors, but accepts substantial variation between positions, resulting in broad classes. In contrast, a narrow interpretation might create separate narrow classes to address such variations.

A good classification plan balances “ease of administration” with position validity. Complex classification structures with multiple job families, multiple class series, and multiple levels within each series can be difficult to administer. However, when class concepts are excessively broad and/or too general, position classification maintenance (and responding to out-of-class complaints) is often difficult, time consuming and expensive. In general, when the type of work assigned to different positions varies dramatically, it often makes sense to place them in separate job families so that valid market comparisons can be made. Further, when the level of work within a job family has clear, job-related distinctions, separate classes usually offer the most efficient way to pay for the work that is being done. Thus, a realistic and successful plan usually includes both broad and narrow classes.

The Advantages of Broad Versus Narrow Classes

The implementation of a broad versus narrow classification structure is an organizational policy decision, which is undertaken based upon the organization’s goals and objectives. Both approaches have advantages and disadvantages that should be considered when developing a classification plan.

The advantages of grouping sufficiently similar positions into broad classes include: ease of administering the classification plan; the ability to add, delete or change duties of a position and still be consistent with the classification plan; the ability to transfer individuals laterally within the organization; and a reduced need for recruitment and testing to fill single position classes. Likewise, if an organization desires or needs to have the flexibility to temporarily or permanently move positions between work units, broad classes can be beneficial in allowing movement to occur without creating classification or equity concerns. Such flexibility also minimizes layoffs resulting from reorganization processes and allows for greater employee

Attachment B

career mobility by broadening the opportunities for advancement. For these reasons, organizations typically choose to group positions into broad classes whenever practical.

On the other hand, broad classes can be challenging when it comes to salary administration. In determining class salaries, most organizations use a combination of market and internal relationship data, tempered with organizational philosophy and experience. An organization that is having difficulty recruiting for a particular type of position may wish to elevate the salary for that position. However, when such positions are part of a broad class, salary changes would impact the entire class. For these reasons, organizations sometimes choose to divide a broad class because of salary issues. If it can be demonstrated that certain types of positions within a broad class are unnecessarily influencing the salary for the entire class, the organization may prefer separate classes so that salaries for each position group can be established.

Preponderance

Some positions may have a mixture of duties related to several different occupational fields, and incumbents may even have various levels of responsibility. In these cases, allocation of the class is based on the preponderant duties. Since preponderance considers importance, it should be noted that the most time-consuming duties of a position are not necessarily preponderant, nor are they the most responsible and complex duties. However, such is the case most of the time.

Classification of the Position, Not the Employee

The class of a position should be consistent regardless of who holds the position. As such, the classification study process classifies **positions**, not individual **employees**. In fact, positions are generally evaluated based on what they would look like if vacant or occupied by other employees.

Furthermore, classification does not consider the capabilities of individual employees or the efficiency and effectiveness of an incumbent. It is not a measure of how well an individual employee performs. Classification is not a tool to reward individual achievement, nor should classes be created simply to reward length of service.

Level and Not Volume of Work

Position classification reflects the **type** and **level** of work performed by an employee, and thus it is generally independent of **volume**. If one employee has twice the amount of work of another, yet they spend the same percentages of time on those tasks and other duties are comparable, they will be placed in the same class. In fact, study questionnaires do not ask for, and CPS HR does not consider, the relative productivity of employees as a classification factor. A classification study does not consider the volume of work produced because problems of excessive workload are properly solved by redistributing work or adding employees, not by reclassifying existing positions.

Using Classification Factors

To develop classification/allocation recommendations, each position is first analyzed based on the **nature** of work performed. Nature of work refers to the occupation, profession or subject matter field in which

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each position falls. Positions that perform work of a similar nature are considered to be in the same “job family”. Within each job family, the **level** of the position is then established based on various factors such as:

- **Scope and Complexity** - defines the breadth and difficulty of the assigned function or program responsibility inherent in the classification and the variety and nature of work performed.
- **Decision-Making/Authority** - consists of (a) the decision-making responsibility and degree of authority, independence or latitude that is inherent in the position, and (b) the impact of the decisions. This also considers the extent to which rules, regulations, manuals, procedures, prescribed work practices, principles, policies, or other written instruction or methods are available or required to perform the work.
- **Contact with Others Required by the Job** - measures (a) the types of contacts, and (b) the purpose of the contacts.
- **Supervision Received and Exercised** - describes the level of supervision received from others and the nature of supervision provided to other workers. It also relates to the independence of action inherent in a position.
- **Knowledge, Skills and Abilities** - defines the minimum requirements to qualify for the position, including the training, education, experience, licenses, certificates, physical demands, mental exertion and other factors necessary to perform the assigned responsibilities.
- **Authority/Responsibility** - defines the impact on the organization, including accountability and the likelihood/consequence of error.
- **Work Conditions** – identifies a hazardous, dangerous or unpleasant environment, and notes any adverse conditions.

This information is then used to develop a class specification (description) for each identifiable body of work. Individual positions can then be compared against the class specifications to determine how they should be allocated.

Class Level and Titling Conventions

Within any organization, the use of class titles and levels should be based on the specific needs of the organization. At the same time, certain standardized titling and leveling conventions are commonly used when establishing classification plans.

By themselves, titles do not define positions. However, the use of consistent titling conventions can help an organization present a clear picture of its classification structure. That said, titles are often one of the most sensitive issues within an organization. Titles are sometimes perceived as a measure of importance, and thus, employees can be very concerned about title changes. However, when used properly, class titles can provide a quick visual tool for identifying class type and level.

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Like titles, class levels typically follow standard conventions. The following are some of the standardized class levels and titles that may exist within a job family and were applied to the classification of the positions included in this study.

- **Entry/First Working-Level** – is commonly identified as the first level in a multi-level series. Most entry-level classes describe positions that provide on-the-job training to employees and thus do not require job applicants to have substantial related work experience. In such situations, entry-level classes function as “trainee” classes and as experience is obtained, employees perform their duties with less immediate supervision.

In some organizations, the first class in a series may be more appropriately described as the “first working” level of the series rather than the “entry” level because the job requires applicants to have previous experience performing similar work and thus they are not newly “entering” the profession.

- **For METRO**, several “first working-level” classes have been proposed where it appeared that workers hired at the first level would likely be promoted to the journey-level class when fully qualified. We have utilized a consistent titling strategy in such cases, using the Roman Numeral “I” after the descriptive portion of the class title (e.g., Accountant I).
- **Journey-Level** – may be the second working-level class in a multi-level class series, but always describes the class where incumbents are fully trained to perform the majority of non-specialized, non-leadership class series work. If a “working-level” class is not part of a series, it is still a “journey-level” class if incumbents will ultimately be expected to perform the full range of non-specialized, non-leadership duties. They may also assist in training and providing direction to others, particularly those at the entry level.
 - **For METRO**, proposed journey-level classes that are the second level in a series have been identified by adding the Roman Numeral “II” after the descriptive portion of the class title (e.g., Accountant II). However, many of the proposed journey-level classes are not in a series and therefore were not given a numerical designation. Instead, they were given a broadly descriptive title (e.g., “assistant”, “worker”, “mechanic”, “representative”, “analyst”, “officer”, etc.).
- **Advanced Level** – this is typically the level in a series that follows the journey level. Positions at this level have advanced or “specialized” assignments that are not given to all positions in the series. Examples of advanced/specialized roles are serving as a lead worker over subordinate staff and coordinating a program. In any case, “advanced” designation is only appropriate if the duties are above the journey-level and position allocations are limited. For that reason, not all class series have an advanced level class.
 - **For METRO**, most advanced-level classes are identified by word **senior** in the title (e.g., Senior Custodial Service Worker).

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- **Technician** – is sometimes used by organizations to identify skilled trade classes or those with a technology emphasis. However, the term “technician” also describes sub-professional administrative classes where incumbents must regularly interpret and apply specialized laws, regulations and/or policies in order to make difficult decisions.
 - **For METRO**, technical-level classes are identified by the use of the word **technician** in the title. Some technician classes exist in series (e.g., Accounting Technician I and II). However, others may be a stand-alone journey-level class.
- **Specialist** – is a broad term that can be used to describe multiple positions and multiple levels. By itself, it is not a leveling term. However, within a series, it is typically used to describe a class above the journey-level where lead work or program coordination is not a preponderant duty.
- **Coordinator** – is also a broad term that is occasionally used when “coordination” of a program of function is the preponderant assignment of the class. While it is not necessarily a leveling term, it would generally be appropriate for a class above the journey level when the class is part of a series.
- **Analyst** – is a title used only for professional-level classes where the preponderant duties involve breaking down a complex problem into various components; conducting research to understand how the components interact with and impact each other and how each component affects the problem; using the information gained to develop a recommendation on how to solve the problem; and preparing a comprehensive report that describes the proposed solution to the problem and explains how that conclusion was reached. Analyst classes typically require education equivalent to at least a bachelor’s degree and varying amounts of post-graduate experience.
- **Supervisor** – is used for positions where the preponderant responsibility is to supervise subordinate positions. Supervisors may also perform day-to-day work similar to their subordinates in type, but usually are responsible for the more difficult or sensitive work in addition to their supervisory duties. Supervisory criteria can vary between organizations, but most supervisory classes are defined by their supervision over “regular” (full-time) employees. In most public agencies, regular employees have statutory employment rights and personnel actions imposed on them, such as hiring/firing, corrective action, and performance evaluations, and must comply with legal, contractual and/or policy guidelines. Furthermore, several State and federal laws define supervisors as being legally responsible for their employment-related actions. Thus, true supervision is a distinct, complex and highly responsible duty.

Within a class series, a supervisory-level level class would be appropriate for a position that supervises subordinate positions in the same series. For example, an Accountant Supervisor is necessary to supervise the work of other professional Accountants. However, supervision of positions in a lower-level series does not necessarily justify classification to a supervisory class. For example, a position that only supervises Accounting Clerks and Accounting Technicians would

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not necessarily have to be classified as an Accountant Supervisor. Instead, such supervisory duties could appropriately be assigned to an Accountant II.

It is also important to distinguish between “true” supervision and lead work. Incumbents that assign, direct, and monitor the work of subordinate staff but do not have substantial control over subordinates’ employment through personnel actions like hiring/firing, corrective action, and performance evaluations, are not “supervisors”. Instead, such positions may be most appropriately classified to a lead worker class.

- **For METRO**, supervisory classes are distinguished by the word **supervisor** or **supervising** in the class title.

Flexible Allocation

Flexible allocation is an administrative and budgeting tool that assists organizations in planning for work that can be assigned at more than one class level. In a flexibly allocated position, an employee may be hired at an initial level (e.g., the entry or first-working level) and then be promoted to the next level without a competitive process when the qualifications for the next level are met.

Flexible allocation is beneficial when an organization is willing to initially hire an employee with limited qualifications, provide the training needed for the employee to learn and eventually perform the full scope of journey-level duties, and then promote the employee to the next level when qualified without requiring a visible competitive process (no vacancy is necessary). Instead, it is the employee’s demonstrated performance of the higher-level duties that functions as the “test” by which promotion is justified. By flexibly allocating the position, the organization gets the benefit of bringing new employees into the organization at a lower (and less costly) level, while allowing the organization to appropriately classify their positions if/when the duties change without going through a cumbersome recruitment or classification process. Thus, it is useful for both recruitment and retention.

Since promoting from one level to the next higher level in a flexibly allocated position may be viewed as a promotion without an official, merit-based test, the manager/supervisor should provide written measurement of the employee’s performance with attention to timeliness, accuracy and detail. The employee’s performance should be at a level that clearly demonstrates that a promotion is warranted. Criteria for advancement should be based on an established policy decision prior to implementing flexible allocation and should be sufficiently understood that it can be articulated to all staff. Where flexibly allocated positions exist in multiple divisions, consistent development and application of promotional criteria is essential.

Career Ladders

While flexible staffing addresses the natural progression of work that is expected in many jobs, career ladders are designed to identify and facilitate opportunities for employees to progress to a higher level of job responsibility. The degree to which an organization should proactively incorporate career ladders into its classification plan should be based on three primary preconditions: 1) the organization must have a

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genuine business need for higher-level work, and should not promote employees simply to retain them; 2) employees must be both interested in the higher level work and willing to develop their ability to perform it successfully; and 3) the organization must consider it preferable to retain employees rather than bring in new people who have gained experience elsewhere.

Ultimately, the degree to which an employer actively facilitates employee career progression may have the most significant impact on employee professional growth. Employer-paid training, educational reimbursement, and educational incentives provide proactive and effective ways of encouraging employees to improve their education and skills. However, there are also several ways that a classification plan can be designed to support such growth.

One of the first things an employer can do to encourage employee growth and development is to identify job families and class series so that employees can see which classes are “related” to each other. As noted earlier in this report, a “job family” is broader than a “class series”, and a job family may include several class series.

- **For METRO**, CPS HR has retitled classes to improve the visibility of class relationships.

Second, incorporating “distinguishing characteristics” language into the class descriptions assists employees in recognizing the differences between levels within a class series. Thus, employees are better able to identify the work performed at the different levels of the series.

- **For METRO**, CPS HR has added a “distinguishing characteristics” section to all of the proposed class specifications.

Third, employers can facilitate employee progression by allowing experience in a lower level class to substitute for some of the requirements required at the higher-level class. If an employer uses “inflexible” recruitment standards, substitution language can be incorporated individually into the class descriptions. As an alternative, employers may choose to incorporate “flexible” language into the class specifications which give the employer the option of evaluating each applicant’s background on a case-by-case basis. Thus, while a class may normally require a bachelor’s degree, flexible language that allows for “any combination of education and/or experience that provides the require knowledge and abilities” to be qualifying gives the employer the ability to make exceptions.

However, there are practical limitations to the use of flexibly qualification standards. If the bachelor’s-level education is essential to meet professional or licensing standards, it is not reasonable to promote an employee who does not meet such standards into the job. Likewise, if an employer is inconsistent in utilizing such flexibility (e.g., allowing employee “A” to qualify without the degree but requiring employee “B” to have it), the employer could be vulnerable to accusations of bias. Consistent application of “flexible” recruitment standards is the key to their success.

- **For METRO**, CPS HR has added a flexible statement to each class specification which allows for consideration of each applicant’s qualifications on a case-by-case basis, while still identifying the education, training and experience qualifications that would typically be considered qualifying.

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Finally, employers who wish to encourage upward mobility in the workforce are wise to continuously monitor their class plan for consistency with best market practices, particularly in terms of class titling, leveling and recruitment standards. For example, requiring a bachelor's degree to qualify for a job when similar employers in the market only require experience to qualify for the same job, will discourage employees from promoting and will likely encourage them to seek work elsewhere. On the other hand, the absence of reasonable employment standards that are consistent with the market will suggest to employees that longevity is the primary basis for promotion and they will have no motivation for self-improvement.

- **For METRO**, CPS HR incorporated a number of changes to the proposed draft class specifications to make them more consistent with best market practices in terms of recruitment standards, including changes to titles and minimum qualifications. CPS HR has also clarified the relationships between classes in terms of leveling.

IV. Findings and Recommendations

Overview

Included as appendices in this report are several documents that summarize the findings and recommendations of this classification study.

- [Appendix A](#) provides a “crosswalk” to show the relationship between current and proposed class titles and provides brief summary comments about any changes CPS HR made to the classes.
- [Appendix B](#) provides a copy of the Position Description Questionnaire (PDQ) used in the study.
- [Appendix C](#) provides a table summarizing the allocation recommendations for all of the study positions, sorted by incumbent name and including comments.
- [Appendix D](#) provides the same information as Appendix C, sorted by current class title.

Explanation of Terms

The appendices include the following terms to describe the actions being recommended by CPS HR.

- **Maintain** is recommended when the duties and responsibilities of the position are identified as consistent with both the current METRO class specification and the proposed draft class specification prepared by CPS HR.
- **Retitle** is recommended when the current class title is not optimally descriptive of the work and/or is not consistent with best market practice for similar types of jobs.
- **Reclassify** is recommended when the work being performed by the incumbent is substantially different than what is described by the current class specification for the position. Positions are either reclassified to an existing METRO class or to a newly developed class, depending on whether an appropriate METRO class currently exists.

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V. Conclusion

Based on conversations with the METRO project coordinator, CPS HR is aware that METRO is interested in evaluating the proposed classification plan as it relates to the agency's long-term organizational goals. Specifically, the project coordinator indicated that some of the currently vacant classes might not be necessary in the future or that some additional classes might be necessary to support the organization's strategic plan.

Although a deeper analysis and understanding of METRO's long-term organizational goals is beyond the scope of this current study, CPS HR welcomes an opportunity to participate in a future discussion about how CPS HR can assist METRO in achieving their organizational development goals and objectives.

CPS HR Consulting is pleased to provide this Draft Classification Study Report to the Santa Cruz Metropolitan Transit District. CPS HR welcomes feedback from METRO and will await response to this Draft Report before submitting a Final Report.

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Appendix A: Current and Proposed Class Crosswalk

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Original Job Title	New Title	Comments
Receiving Parts Clerk	<Abolish>	Reclassify incumbent to Parts Clerk and abolish class because it is indistinguishable from Parts Clerk; department manager supports
Transportation Planning Aide	<Abolish>	Abolish class because it duplicates Transportation Planner I (vacant class)
Lead Custodian (Custodial Coord)	<See Custodial Supervisor>	Reclassify incumbent to new class of Custodial Supervisor and abolish this class; department manager supports
Customer Service Coordinator	<See Customer Service Supervisor>	Reclassify incumbents to Customer Service Supervisor and abolish this class; department manager supports
Accessible Services Coordinator	Accessible Services Coordinator	Updated specification but class concept remains consistent with original
Accountant I	Accountant I	Updated specification but class concept remains consistent with original
Accountant II	Accountant II	Updated specification but class concept remains consistent with original
Supervising Accountant	Accountant Supervisor	Updated and retitled specification but class concept remains consistent with original
Account Clerk	Accounting Clerk	Updated and retitled specification but class concept remains consistent with original
Accounting Technician	Accounting Technician I	Updated and retitled specification but class concept remains consistent with original
Senior Accounting Technician	Accounting Technician II	Updated and retitled specification but class concept remains consistent with original
Accounting Specialist	Accounting Technician Specialist	Updated and retitled specification but class concept remains consistent with original
Administrative Assistant	Administrative Assistant	Updated specification but class concept remains consistent with original

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Original Job Title	New Title	Comments
Administrative Specialist	Administrative Specialist	Updated specification but class concept remains consistent with original
Administrative Assistant Supervisor	Administrative Supervisor	Updated and retitled specification but class concept remains consistent with original
Administrative Clerk I	Administrative Clerk	Updated and retitled specification but class concept remains consistent with original
Benefits Administrator	Benefits Technician	Updated and retitled specification but class concept remains consistent with original
Claims Investigator I	Claims Technician I	Updated and retitled specification but class concept remains consistent with original
Claims Investigator II	Claims Technician II	Updated and retitled specification but class concept remains consistent with original
Custodial Service Worker I	Custodial Service Worker	Updated and retitled specification but class concept remains consistent with original
<None>	Custodial Supervisor	Recommend new class to appropriately describe job
Customer Service Representative	Customer Service Representative	Updated specification but class concept remains consistent with original
<None>	Customer Service Supervisor	Recommend new class to appropriately describe job
Electronic Technician	Electronic Technician	Updated specification but class concept remains consistent with original
Facilities Maintenance Worker I	Facilities Maintenance Assistant	Updated and retitled specification but class concept remains consistent with original
Facilities Maintenance Supervisor	Facilities Maintenance Supervisor	Updated specification but class concept remains consistent with original
Facilities Maintenance Worker II	Facilities Maintenance Worker	Updated and retitled specification but class concept remains consistent with original

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Original Job Title	New Title	Comments
Financial Analyst	Financial Analyst I	Updated and retitled specification but class concept remains consistent with original
Senior Financial Analyst	Financial Analyst II	Updated and retitled specification but class concept remains consistent with original
Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Updated specification but class concept remains consistent with original
Grants/Legislative Analyst	Grants/Legislative Analyst	Updated specification but class concept remains consistent with original
Human Resources Generalist	Human Resources Analyst	Updated and retitled specification but class concept remains consistent with original
Human Resources Clerk	Human Resources Clerk	Updated specification but class concept remains consistent with original
Human Resources Specialist	Human Resources Specialist	Updated specification but class concept remains consistent with original
Personnel Technician	Human Resources Technician	Updated and retitled specification but class concept remains consistent with original
IT Technician	IT Technician I	Updated and retitled specification but class concept remains consistent with original
Senior IT Technician	IT Technician II	Updated and retitled specification but class concept remains consistent with original
Legal Secretary	Legal Secretary	Updated specification but class concept remains consistent with original
Mechanic I	Mechanic I	Updated specification but class concept remains consistent with original
Mechanic II	Mechanic II	Updated specification but class concept remains consistent with original

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Original Job Title	New Title	Comments
Mechanic III	Mechanic III	Updated specification but class concept remains consistent with original
Paralegal	Paralegal	Updated specification but class concept remains consistent with original
Paratransit Eligibility Coordinator	Paratransit Eligibility Coordinator	Updated specification but class concept remains consistent with original
Supervisor/Parts & Materials - FM	Parts and Materials Supervisor	Updated and retitled specification but class concept remains consistent with original
Payroll Specialist	Payroll Technician	Updated and retitled specification but class concept remains consistent with original
Planning Analyst	Planning Data Analyst	Updated and retitled specification but class concept remains consistent with original
Transit Surveyor	Planning Program Aide	Updated and retitled specification but class concept remains consistent with original
Purchasing Agent	Purchasing Agent	Updated specification but class concept remains consistent with original
Purchasing Assistant	Purchasing Technician	Updated and retitled specification but class concept remains consistent with original
Revenue Specialist	Revenue Collection Clerk	Updated and retitled specification but class concept remains consistent with original
Supervisor of Revenue Collection	Revenue Collection Supervisor	Updated and retitled specification but class concept remains consistent with original
Safety & Training Coordinator	Safety and Training Coordinator	Updated specification but class concept remains consistent with original
Assistant Safety and Training Coord	Safety and Training Instructor	Updated and retitled specification but class concept remains consistent with original

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Original Job Title	New Title	Comments
Safety Specialist	Safety Program Specialist I	Updated and retitled specification but class concept remains consistent with original
Senior Safety Specialist	Safety Program Specialist II	Updated and retitled specification but class concept remains consistent with original
Schedule Analyst	Scheduling Specialist	Updated and retitled specification but class concept remains consistent with original
Custodial Service Worker II	Senior Custodial Service Worker	Updated and retitled specification but class concept remains consistent with original
Senior Customer Service Representative	Senior Customer Service Representative	Updated specification but class concept remains consistent with original
Senior Facilities Maintenance Worker	Senior Facilities Maintenance Worker	Updated specification but class concept remains consistent with original
Lead Mechanic	Senior Mechanic	Updated and retitled specification but class concept remains consistent with original
Paralegal with HR Duties	Senior Paralegal	Updated and retitled specification but class concept remains consistent with original
Senior Payroll Specialist	Senior Payroll Technician	Updated and retitled specification but class concept remains consistent with original
Lead Parts Clerk	Senior Stock Clerk	Updated and retitled specification but class concept remains consistent with original
Senior Transportation Planner	Senior Transportation Planner	Updated specification but class concept remains consistent with original
Vehicle Service Technician	Senior Vehicle Service Worker	Updated and retitled specification but class concept remains consistent with original
Parts Clerk	Stock Clerk	Updated and retitled specification but class concept remains consistent with original

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Original Job Title	New Title	Comments
Systems Administrator	Systems Administrator I	Updated and retitled specification but class concept remains consistent with original
Senior Systems Administrator	Systems Administrator II	Updated and retitled specification but class concept remains consistent with original
Ticket and Pass Program Specialist	Ticket and Pass Program Specialist	Updated specification but class concept remains consistent with original
Transit Supervisor	Transit Supervisor	Updated specification but class concept remains consistent with original
Junior Transportation Planner	Transportation Planner I	Updated and retitled specification but class concept remains consistent with original
Transportation Planner	Transportation Planner II	Updated and retitled specification but class concept remains consistent with original
Transportation Planning Supervisor	Transportation Planning Supervisor	Updated specification but class concept remains consistent with original
Upholsterer I	Upholsterer I	Updated specification but class concept remains consistent with original
Upholsterer II	Upholsterer II	Updated specification but class concept remains consistent with original
Body Shop Repair Mechanic	Vehicle Body Repair Mechanic	Updated and retitled specification but class concept remains consistent with original
Vehicle Service Detailer	Vehicle Service Detailer	Updated specification but class concept remains consistent with original
Vehicle Service Worker I	Vehicle Service Worker I	Updated specification but class concept remains consistent with original
Vehicle Service Worker II	Vehicle Service Worker II	Updated specification but class concept remains consistent with original

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Appendix B: Santa Cruz METRO SEIU PDQ Form

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Purpose

The position description questionnaire (PDQ) is designed to obtain information about jobs within the organization for classification purposes only.

The goal of the PDQ is to capture a **current** and **accurate** picture of the work being performed within a specific position. The information collected will be used to update classifications as necessary and make recommendations to management. This questionnaire will be used to evaluate the duties that constitute the **position**, not the performance or qualifications of the **employee**.

Employee

There are response boxes in each section where you may provide information about your position. Use the summary boxes to confirm accurate information in your job description, write in new or additional tasks/functions as needed, explain changes or corrections that should be made, and provide any other feedback to be considered during the review process.

When completing the PDQ, you may:

- Use your existing job description for reference while completing the PDQ.
- Complete as a group only if all respondents are in the same classification and department, under the same supervisor, and most importantly, perform identical duties to yours.
- You may attach additional information such as organizational charts, job flyers, etc., with your PDQ.

Completing the PDQ

If completing electronically

If you have difficulty opening or completing the document, please ensure that your MS Office Word is compatible with Word 2010 (.docx). This document will not work in Word 97-2003 (.doc).

1. Save PDQ to your computer using the file naming convention of *Classification_LastName-First Name_SCMTD_PDQ.doc*

Example: Accountant_Smith-John_SCMTD_PDQ.doc
2. Save additional documentation as a separate document using the file naming convention of *Classification_Last Name-First Name_SCMTD_Supporting*
3. Email the completed PDQ and additional documentation to CPS HR.

The PDQ should be completed by the employee, direct supervisor, and manager. The Manager will submit the completed PDQ to SCMTD Human Resources. CPS HR will only accept PDQs from your human resources contact.

Upon completion of the PDQ, please send to classandcomp@cpsshr.us by Friday, October 1, 2018.

Thanks again for your participation! If you have any questions, please contact:

Angela Aiken	AAitken@scmtd.com	(831) 420-2530
Jennifer Ramos	jramos@cpsshr.us	(916) 471-3125
Lynda Guerra*	classandcomp@cpsshr.us	(916) 471-3473
(*technical support)		

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EMPLOYEE INFORMATION

Name:

Work Phone Number:

Work Location:

Work E-mail Address:

Current Classification Title:

Length of Time in Current Position:

Supervisor's Name:

Supervisor's Classification Title:

If group PDQ, please add all additional respondents. If any of the answers to the following questions are 'no' for an individual, they must complete a separate PDQ.

Full Name	Time in Current Position	Same Classification	Same Supervisor	Same Department
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

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SECTION 1: JOB SUMMARY

1A: Classification Definition

In three to five sentences, briefly describe the **major** purpose(s) and/or function(s) of your job.

For example:

“One of the main purposes of the position is to review civil engineering plans for commercial development. Another is to generate plans for capital improvement, which includes survey work, engineering design, plan drafting, and costing.”

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SECTION 2: POSITION FUNCTIONS

2A: Essential Functions

List the essential job functions of your classification. Most jobs consist of 8 – 10 essential functions.

As you provide a description of your essential functions, please use terms that anyone reviewing this form will be able to understand. Avoid abbreviated, vague, or abstract words, such as “assists”, “handles”, “keeps”, or “prepares”, unless you describe how you assist, what you prepare, etc. Be specific. For example:

DO THIS

- Receives, opens, time stamps, and distributes incoming mail
- Calculates, verifies, and posts billing amounts
- Maintains accurate records on the flow of input information, output records, machine operations, operator assignments, and staff time

DON'T DO THIS

- Assists in handling mail
- Prepares final billings
- Keeps records

In addition to writing the statements, please rate each on frequency, importance, needed at entry, whether added in past year, % of time spent on the task, where the work comes from, and work with whom to complete.

Statement Rating

- **Frequency:** How frequently do you perform this task?
 - **Never.** I do not perform this task in my job.
 - **Infrequently.** I perform this task no more than once a month.
 - **Somewhat frequently.** I perform this task no more than once a week.
 - **Frequently.** I perform this task several times a week, but no more than once a day.
 - **Very frequently.** I perform this task several times each day.
- **Importance:** How important is this task for successfully performing your job?
 - **Not important.** This task is not important to my job. Failure to successfully perform this task typically has no consequence.
 - **Minor importance.** This task is of minor importance to my job. Failure to successfully perform this task has little or no consequence.
 - **Important.** This task is important to my job. Failure to successfully perform this task has some negative consequences.
 - **Critical.** This task is one of the most essential tasks of my job. Failure to successfully perform this task has significant negative consequences.
- **Needed at Entry:** Is it necessary to know how to perform this task upon entry into this job?
 - **No** = Success in this job does not require proficiency in this task prior to entry. Job demands allow a newly hired person to acquire task proficiency through training or experience on the job.
 - **Yes** = Success in this job requires experience performing this task prior to entry. Job demands require task proficiency soon after hire (for example, in the first week or so) and there is no opportunity to learn to perform this task through training or experience on the job.
- **Added in Last Year:** Was the task added in the past year?

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- **% of Time Spent on Task:** Provide the approximate percent of time spent on each essential function. The total of all percentages should equal 100%. If the total percent of time spent on tasks totals more than 100% due to overlap in duties, please explain in the text box below.

Attachment B

	1	2	3	4	5	6	7	8
#	Essential Function	Frequency	Importance	Needed at Entry	Added in Last Year	% of time Spent on Task	Where Does Work Come From	Work with Whom to Complete
1		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
2		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
3		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
4		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
5		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
6		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
7		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			

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	1	2	3	4	5	6	7	8
#	Essential Function	Frequency	Importance	Needed at Entry	Added in Last Year	% of time Spent on Task	Where Does Work Come From	Work with Whom to Complete
		<input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Critical					
8		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
9		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
10		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
11		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			
12		<input type="checkbox"/> Never <input type="checkbox"/> Infrequently <input type="checkbox"/> Somewhat Frequently <input type="checkbox"/> Frequently <input type="checkbox"/> Very Frequently	<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No			

Attachment B

2B: Occasional Functions/Special Tasks & Duties

List other tasks/duties not listed in Section 2A that are performed occasionally as part of the job. If you need more space, attach additional pages.

Frequency: Indicate the number of times per week/month/quarter/year etc., or number of hours per week/month etc.

#	Occasional/Special Function	Frequency	Added in Last Year
1			<input type="checkbox"/> Yes <input type="checkbox"/> No
2			<input type="checkbox"/> Yes <input type="checkbox"/> No
3			<input type="checkbox"/> Yes <input type="checkbox"/> No
4			<input type="checkbox"/> Yes <input type="checkbox"/> No

2C: Similar Duties Performed by Others

Do any other employees perform duties similar/identical to this job? If so, list their names and titles.

#	Employee	Title
1		
2		
3		
4		

Attachment B

2D Continued – Comments

Please provide any additional comments for review regarding **essential function**.

Attachment B

SECTION 3: KNOWLEDGE/SKILLS/ABILITIES

Knowledge, Skills, and Abilities (KSAs) are defined as:

- **Knowledge:** A body of information that an individual must know to perform an activity; understanding gained through experience or education. (Examples: Knowledge of Departmental Rules and Regulations, and Knowledge of UNIX programming language/protocols)
- **Skill:** A learned physical/psychomotor act. (Examples: driving a car, using hand tools, and typing)
- **Ability:** The potential to apply a knowledge or skill to a given situation; abilities usually involving cognitive processing. (Examples: mathematical ability, ability to communicate orally, writing ability, and ability to read blueprints)

Briefly and accurately report the KSAs needed to perform this position. You may refer to your current job description. Rate each statement on importance, whether needed at entry, and value.

After reading the KSAs, rate each statement on the following:

- **Importance:** How important is this KSA for successfully performing your job?
 - **Not important.** This KSA is not important to successful performance.
 - **Minor importance.** This KSA is of minor importance to successful job performance.
 - **Important.** This KSA is important for successful performance.
 - **Critical.** This KSA is essential to the job and is critically important to successful performance.
- **Needed at Entry:** Is this KSA needed upon entry into this job? In other words, must an individual be competent in a particular area before entering the job, or is an individual expected to gain competence through training or experience on the job?
 - **No** = Successful job performance does not require proficiency in this KSA prior to entry. Competence in this area must be developed over time through training or experience on the job.
 - **Yes** = Successful job performance requires this KSA prior to entry. Competence in this area is difficult to acquire, and job demands require this KSA soon after hire (for example, in the first week or so).
- **Distinguishing Value:** Beyond a minimally required level, do employees who have greater competence in this KSA perform more effectively than employees who are less competent in this KSA?
 - **No** = Success in this job does not require proficiency in this task prior to entry. Job demands allow a newly hired person to acquire task proficiency through training or experience on the job.
 - **Yes** = Success in this job requires experience performing this task prior to entry. Job demands require task proficiency soon after hire (for example, in the first week or so) and there is no opportunity to learn to perform this task through training or experience on the job.

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3A: Knowledge Statements

#	Knowledge Statement	Importance	Needed at Entry	Distinguishing Value
1		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
2		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
3		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
4		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
5		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
6		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
8		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
9		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
10		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Attachment B

3B: Skill Statements

#	Skill Statement	Importance	Needed at Entry	Distinguishing Value
1		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
2		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
3		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
4		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
5		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
6		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
8		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
9		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
10		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

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3C: Ability Statements

#	Ability Statement	Importance	Needed at Entry	Distinguishing Value
1		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
2		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
3		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
4		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
5		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
6		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
7		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
8		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
9		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
10		<input type="checkbox"/> Not Imp. <input type="checkbox"/> Minor Imp. <input type="checkbox"/> Important <input type="checkbox"/> Critical	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

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3D: Additional Statements and Comments

Please provide any additional comments for review regarding KSAs.

Attachment B

SECTION 4: MINIMUM QUALIFICATIONS

4A: Education

Check the education that is minimally required to perform the job:

- | | |
|--|--|
| <input type="checkbox"/> Less than High School | <input type="checkbox"/> Bachelor's Degree (Undergraduate) |
| <input type="checkbox"/> High School Diploma or Equivalent (GED) | <input type="checkbox"/> Graduate Degree |
| <input type="checkbox"/> Technical School | <input type="checkbox"/> Doctorate Degree |
| <input type="checkbox"/> Associate Degree | |

4B: Experience

Check the years of experience that is needed to proficiently perform the job:

- | | |
|---|---|
| <input type="checkbox"/> No experience needed | <input type="checkbox"/> 3 years |
| <input type="checkbox"/> 6 months or less | <input type="checkbox"/> 4 years |
| <input type="checkbox"/> 1 year | |
| <input type="checkbox"/> 2 years | <input type="checkbox"/> Other: <input type="text"/> (enter length of time and specify months/year) |

4C: Additional Education or Experience

Describe any specific education and/or previous work experience required to perform the job. (For example, what type of background would you expect a successful job applicant to have?)

4D: Licenses & Certifications

1. Does the job require a Driver's License?

- YES NO

If yes, specify type:

2. Please list any other licenses or certificates required by law or your employer to perform your job.

#	License or Certificate	Required by:	
		Law	Employer
1		<input type="checkbox"/>	<input type="checkbox"/>

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#	License or Certificate	Required by:	
		Law	Employer
2		<input type="checkbox"/>	<input type="checkbox"/>
3		<input type="checkbox"/>	<input type="checkbox"/>

4E: Equipment Used

List electronic equipment, software, machines, tools, instruments, equipment, protective or vehicles used in performing the essential duties of the job. Give the percent of time spent in use or operation for each.

#	Equipment	% of Time	#	Equipment	% of Time
1			4		
2			5		
3			6		

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SECTION 5: IMPACT AND SCOPE

5A: Work Products

List services and/or any work products directly generated as a result of the tasks and duties performed (e.g., policies, guidelines, budgets, reports, letters, memos, computer-generated printouts, profit and loss statements, etc.). List the receiver of each of these services/work products.

#	Services/Work Product(s)	Receiver(s)
1		
2		
3		
4		
5		

5B: Boards, Commissions, and/or Standing Committees

List Boards, Commissions, and/or Standing Committees assigned as part of the duties of the position and indicate the participatory role by checking the appropriate box.

#	Board / Commission / Committee	Receiver(s)			
		Chair	Member	Executive Officer	Staff Support
1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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#	Board / Commission / Committee	Receiver(s)			
		Chair	Member	Executive Officer	Staff Support
3		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5C: Internal Contacts

List persons within the organization, other than the direct supervisor and any direct subordinates, with whom there is regular contact while performing the duties of the position. Briefly describe the purpose (for example, to exchange information, make recommendations, make decisions, resolve conflicts) for these contacts and the frequency of their occurrence (e.g. daily, weekly, monthly, quarterly, annually).

#	Internal Contact(s)	Purpose(s)	Frequency
1			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
2			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
3			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
4			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
5			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly

5D: External Contacts

List the contacts regularly made with persons who are external to the organization while performing the duties of the position. Describe the purpose (for example, to exchange information, make recommendations, make decisions, resolve conflicts) of those contacts and the frequency of their occurrence (e.g. daily, weekly, monthly, quarterly, annually).

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#	External Contact(s)	Purpose(s)	Frequency
1			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
2			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
3			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
4			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly
5			<input type="checkbox"/> Daily <input type="checkbox"/> Quarterly <input type="checkbox"/> Weekly <input type="checkbox"/> Annually <input type="checkbox"/> Monthly

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SECTION 6: SUPERVISION/DIRECTION

6A: Supervision/Direction Received

1. Please select **one** of the following types and amount of supervision that best describes the type and amount of supervision that the position receives (even if already described above).

- Supervisor frequently checks job activities.
- Works alone on routine or regular work assignments and checks with supervisor on non-routine assignments or when in doubt as to the correct procedures to follow.
- Receives occasional supervision while working toward a definite objective that requires use of a wide range of procedures. Plans and/or determines specific procedures or equipment required to meet assigned objectives and solves non-routine problems. Refers only unusual matters to supervisor.
- Works from broad policies and towards general objectives. Refers specific matters to superior(s) only when interpretation or clarification of organizational policies is necessary.
- Works from general directives or broadly defined missions of the organization.

2. From whom are work assignments received?

#	Work Assignment(s)	Assigned By	Title
1			
2			
3			
4			
5			

3. How is work checked in order to discover/eliminate errors?

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6B: Supervision/Direction Given

1. Does the position directly supervise employees?

YES NO

Indicate the total number of employees supervised directly:

and indirectly:

2. Does position perform "Lead" duties?

(Lead duties generally include providing training and/or ongoing guidance to staff; assigning and monitoring work; and assisting in providing information to the supervisor in areas such as employee selection, performance evaluations, and coverage schedules. Lead workers are typically not responsible for hiring/firing, corrective action, or preparing performance evaluations though they may provide input for the evaluations.)

YES NO

3. List the employees directly supervised or lead (include name, classification, and status). If position supervises or leads more than ten employees, list only the job titles and number of people supervised:

Status

- FTE = Full-Time Employee
- PTE = Part-Time Career or Part-Time Contract Employee (seasonal/intermittent)
- TEMP = Temporary or Contract Employee

#	Job Title	Name(s)	# FTE	# PT/TEMP
1				
2				

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#	Job Title	Name(s)	# FTE	# PT/TEMP
3				
4				
5				

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4. **What type of supervision/lead is provided?** Please select all of the supervisory/lead duties performed, the level of authority, and indicate whether the activity is performed for employees, non-employees (e.g. contractors), or both.

Duty	No Authority	Recommend	With Prior Approval	On Own Authority	Employee or Non-Employee
Train others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Hire employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Plan and/or schedule work for others on specific projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Plan and/or schedule work for others on a daily basis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assign or delegate work to others on specific projects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Assign or delegate work to others on a daily basis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Monitor work of others on specific projects or on a daily basis (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Establish rules, procedures, and/or standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Approve overtime and/or leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Evaluate performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Take corrective action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Resolve complaints and/or grievances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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SECTION 7: AUTHORITY

1. Check the box which most closely describes the level of discretion and independent judgment that correlates to the level of authority assigned to the position for each listed work activity. Where there are options listed for organization/department/division/section, please circle the level within the organization for which the authority and/or independent judgment is exercised.

Work Activity	No Authority	Recommend	Within Prescribed Guidelines	On Own Authority	Frequency (Daily, Weekly, Monthly)
Determine long-term strategic planning objectives for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Determine and develop policies and procedures for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Change/re-direct policies and procedures for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Implement policies and procedures for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Determine and develop goals and objectives for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Implement goals and objectives for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Acquire resources needed to accomplish goals and objectives for the organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Establish and organize work priorities and processes for own position	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Establish and organize work priorities and processes for other positions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Establish operational and/or capital budget amounts for organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Annual budget amount:					
Authorized expenditure level per occurrence assigned to your position:					
Manage/administer operational and/or capital budget amounts for organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Annual budget amount:					
Authorized expenditure level per occurrence assigned to your position:					
Monitor operational and/or capital budget amounts for organization/department/division/section	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Annual budget amount:					
Authorized expenditure level per occurrence assigned to your position:					

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2. **Authority:** What level of authority does the position have to ensure compliance with laws, codes, and standards?

For example:

- The position can halt construction work if work is found to be out of compliance with standards.
- The position issues warnings to residents. After two warnings, the position initiates legal action by...
- The position arrests individuals breaking the law.

What corrective action is taken if noncompliance or substandard conditions are detected? What options are available?

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3. **Budget:** Are there any duties and responsibilities in the organization budget process (e.g., plan, model, prepare, review, monitor, approve, etc.)?

YES NO

If yes, describe the duties and responsibilities below:

Amount of operating budget for which the position is responsible, if any:

4. **Project budgets:** Are there any capital budget responsibilities (e.g. plan, prepare, monitor, approve, etc.)?

YES NO

#	Project Title	Roles/Duties	Project Amount (\$)
1			
2			
3			
4			
5			

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SECTION 8: ESSENTIAL FUNCTIONS – ADA

Physical Requirements

Please review the definitions and check the box that indicates how often you perform each physical requirement listed.

Frequency: This factor considers the frequency in which the physical requirements are performed as part of the essential functions of the job.

Rarely: once or twice, or never

Seldom: quarterly to yearly basis

Occasionally: monthly/bi-monthly basis

Frequently: weekly basis

A few times per day: 1-4 times per day

Several times per day: 5+ times per day

Activity	Rarely	Seldom	Occasional	Frequently	Few Times/Day	Several Times/Day
CLIMBING: Ascends or descends ladders, stairs, scaffolding, ramps, poles, etc. using feet and legs and/or hands and arms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STOOPING: Bends body downward and forward by bending spine at waist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
KNEELING: Bends legs at knee; comes to rest on a knee or knees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CROUCH: Bends body downward and forward by bending leg and spine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CRAWLING: Moves about on hands and knees or hands and feet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
REACHING: Extends hand(s) and arm(s) in any direction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
STANDING: Stands for long periods of time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WALKING: Moves about on feet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SITTING: Sits for extended periods of time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PUSHING: Uses upper extremities to press against something with steady force to thrust object forward, downward or outward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PULLING: Uses upper extremities to exert force to draw, drag, haul or tug objects in a sustained motion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FINGER DEXTERITY: Picks, pinches, types, or otherwise primarily works with fingers rather than the whole hand or arm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Activity	Rarely	Seldom	Occasional	Frequently	Few Times/Day	Several Times/Day
GRASPING: Applies pressure to an object with the fingers and palm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FEELING: Perceives attributes of objects, such as size, shape, temperature, texture, by touching with skin, particularly that of fingertips	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TALKING: Expresses or exchanges ideas by means of the spoken word	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HEARING: Receives detailed information through oral communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BALANCING: Maintains body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces (Exceeds that needed for ordinary locomotion and maintenance of body equilibrium)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Visual Requirements

Check the box that indicates how often you perform each requirement listed.

Frequency: This factor considers the frequency in which the visual requirements are performed as part of the essential functions of the job.

Rarely: once or twice, or never

Seldom: quarterly to yearly basis

Occasionally: monthly/bi-monthly basis

Frequently: weekly basis

A few times per day: 1-4 times per day

Several times per day: 5+ times per day

Activity	Rarely	Seldom	Occasional	Frequently	Few Times/Day	Several Times/Day
Work performed requires the ability to see distances under 12 inches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work performed requires the ability to see at an arm's length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work performed requires the ability to see distances over 20 feet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work performed requires the use of both eyes (field of vision)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Activity	Rarely	Seldom	Occasional	Frequently	Few Times/Day	Several Times/Day
Work performed requires the ability to distinguish basic colors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work performed requires the ability to distinguish shades of colors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work performed requires depth perception	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other Functional Requirements

Check the box that indicates how often you perform each requirement listed.

Frequency: This factor considers the frequency of other functional requirements are performed as part of the essential functions of the job.

Rarely: once or twice, or never

Seldom: quarterly to yearly basis

Occasionally: monthly/bi-monthly basis

Frequently: weekly basis

A few times per day: 1-4 times per day

Several times per day: 5+ times per day

Activity	Rarely	Seldom	Occasional	Frequently	Few Times/Day	Several Times/Day
Operates truck, tractor, motor vehicle, forklift, or other moving equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repetitive use of foot control: <input type="checkbox"/> Right only <input type="checkbox"/> Left only <input type="checkbox"/> Both	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repetitive use of hands: <input type="checkbox"/> Right only <input type="checkbox"/> Left only <input type="checkbox"/> Both	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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SECTION 9: STATEMENTS

9A: Employee's Statement

EMPLOYEE'S STATEMENT

If there are other aspects of your job not covered in this questionnaire that are important in understanding your job content, please describe below. You may also attach additional information or pages if needed. This includes any previous PDQs or job-related documents.

By checking this box, I certify that I am the individual named below who has completed this questionnaire.

Printed Name:

Date:

Classification Title:

If a group PDQ, please have all additional respondents sign.

Full Name	Signature

You have completed the employee section of the Classification Questionnaire.

Please send to your immediate supervisor for review by **Friday, September 21, 2018.**

Thank you for your participation!

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NEXT LEVEL SUPERVISOR STATEMENT

9B: Supervisor Statement

After reviewing this employee's questionnaire carefully to see that it is accurate and complete, please fill out Items 1-8 below.

Do not fill in these items unless you supervise the employee directly. Your certification below means that you accept responsibility for the accuracy and completeness with which the entire questionnaire describes the duties and responsibility of the job.

If the Employee's Statement does not express your view of the duties, responsibilities and essential functions that you have assigned the employee, please clarify or elaborate below. **Please allow your employees to review your responses if they request to see them.**

There are two essential cautions you should observe:

- **Under no circumstances** should the employee's entries in the Employee's Statement section be altered.
- Do not make any statements or comments about the employee's work performance, competence, or qualifications. This questionnaire will be used to evaluate the duties that constitute the **position**, not the performance or qualifications of the **employee**.

1. Does the **job summary/definition** of the classification accurately reflect the general responsibilities and work performed by this classification? If not, please clarify.

2. Do you agree with the **essential tasks** and the ratings provided by the employee? If not, please clarify.

3. Do you agree with **education/experience** statement? If not, please clarify.

4. Do you agree with **licenses/certification** statement? If not, please clarify.

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5. Do you agree with the **impact and scope** as described by the employee? If not, please clarify.

6. Do you agree with the **supervision given/received** as described by the employee? If not, please clarify.

7. What additional information should be considered in evaluating the appropriate classification for this position?

8. Is reorganization or other changes planned or taking place in your organization that will impact the content or level of this job?

By checking this box, I certify that I supervise the employee who has completed this questionnaire.

Printed Name:

Classification Title:

Signature:

Date:

You have completed the next level supervisor section of the Classification Questionnaire.

Please send to your Manager for review by **Friday, September 28, 2018.**

Thank you for your participation!

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MANAGER STATEMENT

9C: Manager Statement

After reviewing this employee's questionnaire carefully to see that it is accurate and complete, please complete the items below.

Do not fill in these items unless you are the applicable manager to the incumbent/classification. Your certification below means that you accept responsibility for the accuracy and completeness with which the entire questionnaire describes the duties and responsibility of the job.

If the Employee's Statement does not express your view of the duties, responsibilities and essential functions that you have assigned the employee, please clarify or elaborate below.

There are two essential cautions you should observe:

- **Under no circumstances** should the employee's entries in the Employee's Statement section be altered.
- Do not make any statements or comments about the employee's work performance, competence, or qualifications. This questionnaire will be used to evaluate the duties that constitute the **position**, not the performance or qualifications of the **employee**.

After you have reviewed this questionnaire and completed this page, please save this document and send to **Angela Aiken in Human Resources by Friday, October 1, 2018.**

Do you agree with the information given by the employee?

YES NO

If not, please clarify:

Printed Name:

Signature:

Classification Title:

Date:

Appendix C: Position Allocation Recommendations Sorted by Incumbent Name

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Abundez Camacho, Luis A	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Alcorn, Holly	Senior Accounting Technician	Accounting Technician II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Alvarez-Castillo, Cesar	Mechanic I	Mechanic I	No	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Arias, Esmeralda	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Ayres, Chrystal L	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Ballesteros, Ivan	Mechanic I	Mechanic I	No	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Barnes, Scott	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	Group	Maintain and retitle
Bauer, Donna	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
Bayer, Lorraine	Accountant II	Accountant II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Berrelleza, Pablo D	Transit Supervisor	Transit Supervisor	Yes	Group	Maintain
Bibriescas, Eduardo	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Blight, Karen J	Administrative Assistant	Administrative Assistant	Yes	Yes	Maintain
Brown, Ernest L	Lead Custodian (Custodial Coord)	Custodial Supervisor	Yes	Yes	Reclassify to new class based on preponderant duties
Brubeck, Delee	Personnel Technician	Human Resources Technician	Yes	Yes	Maintain and retitle
Bushnell, Ron	Transit Supervisor	Transit Supervisor	Yes	No	Maintain

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Bytheway, Mary E	Accounting Specialist	Accounting Technician Specialist	Yes	No	Maintain and retitle
Castillo, Antonio T	Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Yes	No	Maintain
Castillo, Juan V	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Castillo, Vincent	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Cawaling, George T	Receiving Parts Clerk	Stock Clerk	Yes	No	Reclassify based on preponderant duties
Chavarria, Tarquino C	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Crane, Sara M	Administrative Specialist	Accounting Technician II	Yes	Yes	Reclassify based on preponderant duties; actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Cummins, Edward G	Lead Mechanic	Senior Mechanic	Yes	No	Maintain and retitle
Currea, Julio	Mechanic III	Mechanic III	Yes	Group	Maintain
Daugherty, A. J	Accessible Services Coordinator	Accessible Services Coordinator	Yes	Yes	Maintain
Delfin, Flor Monik	Human Resources Generalist	Human Resources Analyst	Yes	No	Maintain and retitle
Diaz, Edward M	Mechanic I	Mechanic I	No	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Estrada, Uriel	Lead Mechanic	Senior Mechanic	Yes	No	Maintain and retitle
Eusse-Gil, Andrea	Schedule Analyst	Scheduling Specialist	Yes	Yes	Maintain and retitle
Favela, Javier	Vehicle Service Technician	Senior Vehicle Service Worker	Yes	No	Maintain and retitle
Fischer, Jennifer	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
Fonseca, Adela N	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Forshner-Jensen, Heather	Customer Service Coordinator	Customer Service Supervisor	Yes	Group	Reclassify to new class based on preponderant duties

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Gallet, Mary R	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Garcia, Antonio Z	Vehicle Service Worker I	Vehicle Service Worker I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Gastelum, Juan G	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Guerrero, Teodoro	Vehicle Service Detailer	Vehicle Service Detailer	Yes	No	Maintain
Guild, Wesley I	Electronic Technician	Electronic Technician	Yes	No	Maintain
Hernandez, Efrain U	Vehicle Service Worker II	Vehicle Service Worker II	Yes	Group	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Hernandez, Jaime	Mechanic III	Mechanic III	Yes	No	Maintain
Hernandez, Maria P	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Hernandez, Victor A	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Hill, Cayla	Planning Analyst	Planning Data Analyst	Yes	No	Maintain and retitle
Hiltner, Thomas M	Grants/Legislative Analyst	Grants/Legislative Analyst	Yes	No	Maintain
Howard, Sandra D	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Iriguchi, Lucas	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	Group	Maintain and retitle
Jeffries, Joan	Administrative Specialist	Administrative Specialist	Yes	No	Maintain
Kane, Chris	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Kegley, Rickie-Ann	Paralegal with HR Duties	Senior Paralegal	Yes	No	Maintain and retitle
Lam, Brian C	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	No	Maintain and retitle

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Legorreta, Pete N	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Leonard, Christopher R	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
LoGiudice, Jason A	Lead Mechanic	Senior Mechanic	Yes	No	Maintain and retitle
MacDonell, Ryan	Lead Parts Clerk - FM	Senior Stock Clerk	Yes	No	Maintain and retitle
Madrigal, Manuel	Vehicle Service Worker I	Vehicle Service Worker I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Marquez, Raymundo D	Vehicle Service Detailer	Vehicle Service Detailer	Yes	No	Maintain
Martin, Dawn	Senior Accounting Technician	Accounting Technician II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Martin, Melody	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Martinez Lucio, Freddie	Payroll Specialist	Payroll Technician	Yes	No	Maintain and retitle
Mata, Joseph G	Upholsterer II	Upholsterer II	Yes	Yes	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Mayweather, Anson B	Ticket and Pass Program Specialist	Ticket and Pass Program Specialist	Yes	No	Maintain
Mendoza, Marisela M	Vehicle Service Worker II	Vehicle Service Worker II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Mendoza, Maritza L	Administrative Assistant Supervisor	Administrative Supervisor	Yes	No	Maintain and retitle
Mihaylova, Kristina	Senior Financial Analyst	Financial Analyst II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Misenheimer, Nathan L	Parts Clerk	Stock Clerk	Yes	No	Maintain and retitle
Moreno, Tomas	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Nevin, John C	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Ng, Jane	Senior Information Technology Technician	Information Technology Technician II	Yes	Yes	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Nolen, Greg	Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Yes	No	Maintain
Olander, Joy J	Senior Payroll Specialist	Senior Payroll Technician	Yes	No	Maintain and retitle
Pena, Leonardo	Safety and Training Coordinator	Safety and Training Coordinator	Yes	No	Maintain
Perez, Christopher D	Mechanic I	Mechanic I	Yes	Group	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Perez, Eric	Vehicle Service Worker II	Vehicle Service Worker II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Pyka, Matthew	Transit Supervisor	Transit Supervisor	Yes	No	Maintain

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Rasmussen, Peter	Transportation Planner	Transportation Planner II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Raygoza-Ramirez, Jose	Mechanic I	Mechanic I	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Rios, Michael	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Rocha, Dario	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Rocha, Luis A	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Rodriguez, Ezequiel	Facilities Maintenance Worker I	Facilities Maintenance Assistant	Yes	No	Maintain and retitle
Rubio, Benjamin T	Customer Service Coordinator	Customer Service Supervisor	Yes	Group	Reclassify to new class based on preponderant duties
Sanchez, Lupe	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Sandoval, Sasha G	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Seda, Delvis F	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Solorio, Rina	Purchasing Assistant	Purchasing Technician	Yes	No	Maintain and retitle
Szestowicki, Thomas	Safety Specialist	Safety Program Specialist I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Thompson, Elizabeth	Transit Supervisor	Transit Supervisor	Yes	Group	Maintain
Thorn, Michael	Mechanic II	Mechanic II	Yes	Group	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Torres, Elmer	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	No	Maintain and retitle
Valdez, David	Vehicle Service Technician	Senior Vehicle Service Worker	Yes	No	Maintain and retitle
Vascones, Jordan	System Administrator	Systems Administrator I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Vasquez, Catalino S	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Vasquez, Cristobal R	Facilities Maintenance Worker I	Facilities Maintenance Assistant	Yes	No	Maintain and retitle
Villarruel Tavares, Juan M	Mechanic I	Mechanic I	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Wagley, Eileen	Paratransit Eligibility Coordinator	Paratransit Eligibility Coordinator	Yes	No	Maintain
Willis, Gregory A	Supervisor/Parts and Materials - FM	Parts and Materials Supervisor	Yes	Yes	Maintain and retitle
Willis, Robert S	Facilities Maintenance Supervisor	Facilities Maintenance Supervisor	Yes	No	Maintain
Woliczko, Stefan T	Senior Facilities Maintenance Worker	Senior Facilities Maintenance Worker	Yes	Yes	Maintain

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Zamarripa, Jose D	Vehicle Service Worker II	Vehicle Service Worker II	Yes	Group	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Zenteno, Daniel P	Mechanic I	Mechanic I	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
ZZZ-VACANT	Account Clerk	Accounting Clerk	Yes	No	Maintain and retitle
ZZZ-VACANT	Accounting Technician	Accounting Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Accounting Technician	Accounting Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
ZZZ-VACANT	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
ZZZ-VACANT	Administrative Assistant Supervisor	Administrative Supervisor	Yes	No	Maintain and retitle
ZZZ-VACANT	Administrative Clerk I	Administrative Clerk	Yes	No	Maintain and retitle
ZZZ-VACANT	Administrative Specialist	Administrative Specialist	Yes	No	Maintain
ZZZ-VACANT	Assistant Safety and Training Coord	Safety and Training Instructor	Yes	No	Maintain and retitle
ZZZ-VACANT	Benefits Administrator	Benefits Technician	Yes	No	Maintain and retitle
ZZZ-VACANT	Body Shop Repair Mechanic	Vehicle Body Repair Mechanic	Yes	No	Maintain and retitle
ZZZ-VACANT	Claims Investigator I	Claims Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Claims Investigator II	Claims Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
ZZZ-VACANT	Custodial Service Worker II	Senior Custodial Service Worker	Yes	No	Maintain and retitle
ZZZ-VACANT	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
ZZZ-VACANT	Financial Analyst	Financial Analyst I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Yes	No	Maintain
ZZZ-VACANT	Human Resources Clerk	Human Resources Clerk	Yes	No	Maintain
ZZZ-VACANT	Human Resources Specialist	Human Resources Specialist	Yes	No	Maintain
ZZZ-VACANT	Junior Transportation Planner	Transportation Planner I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Legal Secretary	Legal Secretary	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
ZZZ-VACANT	Paralegal	Paralegal	Yes	No	Maintain
ZZZ-VACANT	Purchasing Agent	Purchasing Agent	Yes	No	Maintain
ZZZ-VACANT	Revenue Specialist	Revenue Collection Clerk	Yes	No	Maintain and retitle
ZZZ-VACANT	Senior Safety Specialist	Safety Program Specialist I/II	No	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Senior Transportation Planner	Senior Transportation Planner	Yes	No	Maintain
ZZZ-VACANT	Supervising Accountant	Accountant Supervisor	Yes	No	Maintain and retitle
ZZZ-VACANT	Supervisor of Revenue Collection	Revenue Collection Supervisor	Yes	No	Maintain and retitle
ZZZ-VACANT	Transit Surveyor	Planning Program Aide	Yes	No	Maintain and retitle
ZZZ-VACANT	Transportation Planning Aide	Transportation Planner I/II	Yes	No	Reclassify based on preponderant duties; recommend flexible allocation (I/II)

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
ZZZ-VACANT	Transportation Planning Supervisor	Transportation Planning Supervisor	Yes	No	Maintain
ZZZ-VACANT	Upholsterer I	Upholsterer I/II	Yes	No	Maintain and retitle; recommend flexible allocation (I/II)

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Appendix D: Position Allocation Recommendations Sorted by Current Class

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Daugherty, A. J	Accessible Services Coordinator	Accessible Services Coordinator	Yes	Yes	Maintain
ZZZ-VACANT	Account Clerk	Accounting Clerk	Yes	No	Maintain and retitle
Bayer, Lorraine	Accountant II	Accountant II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Bytheway, Mary E	Accounting Specialist	Accounting Technician Specialist	Yes	No	Maintain and retitle
ZZZ-VACANT	Accounting Technician	Accounting Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Accounting Technician	Accounting Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
Bauer, Donna	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
Blight, Karen J	Administrative Assistant	Administrative Assistant	Yes	Yes	Maintain
Fischer, Jennifer	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
ZZZ-VACANT	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
ZZZ-VACANT	Administrative Assistant	Administrative Assistant	Yes	No	Maintain
Mendoza, Maritza L	Administrative Assistant Supervisor	Administrative Supervisor	Yes	No	Maintain and retitle
ZZZ-VACANT	Administrative Assistant Supervisor	Administrative Supervisor	Yes	No	Maintain and retitle
ZZZ-VACANT	Administrative Clerk I	Administrative Clerk	Yes	No	Maintain and retitle
Crane, Sara M	Administrative Specialist	Accounting Technician II	Yes	Yes	Reclassify based on preponderant duties; actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Jeffries, Joan	Administrative Specialist	Administrative Specialist	Yes	No	Maintain
ZZZ-VACANT	Administrative Specialist	Administrative Specialist	Yes	No	Maintain

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
ZZZ-VACANT	Assistant Safety and Training Coord	Safety and Training Instructor	Yes	No	Maintain and retitle
ZZZ-VACANT	Benefits Administrator	Benefits Technician	Yes	No	Maintain and retitle
ZZZ-VACANT	Body Shop Repair Mechanic	Vehicle Body Repair Mechanic	Yes	No	Maintain and retitle
ZZZ-VACANT	Claims Investigator I	Claims Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
ZZZ-VACANT	Claims Investigator II	Claims Technician I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
Abundez Camacho, Luis A	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Castillo, Vincent	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Chavarria, Tarquino C	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Gastelum, Juan G	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Kane, Chris	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
Moreno, Tomas	Custodial Service Worker I	Custodial Service Worker	Yes	No	Maintain and retitle
ZZZ-VACANT	Custodial Service Worker II	Senior Custodial Service Worker	Yes	No	Maintain and retitle
Forshner-Jensen, Heather	Customer Service Coordinator	Customer Service Supervisor	Yes	Group	Reclassify to new class based on preponderant duties
Rubio, Benjamin T	Customer Service Coordinator	Customer Service Supervisor	Yes	Group	Reclassify to new class based on preponderant duties
Arias, Esmeralda	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Fonseca, Adela N	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Gallet, Mary R	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Hernandez, Maria P	Customer Service Representative	Customer Service Representative	Yes	No	Maintain

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Hernandez, Victor A	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Howard, Sandra D	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Martin, Melody	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Sanchez, Lupe	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Sandoval, Sasha G	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
ZZZ-VACANT	Customer Service Representative	Customer Service Representative	Yes	No	Maintain
Guild, Wesley I	Electronic Technician	Electronic Technician	Yes	No	Maintain
Willis, Robert S	Facilities Maintenance Supervisor	Facilities Maintenance Supervisor	Yes	No	Maintain
Rodriguez, Ezequiel	Facilities Maintenance Worker I	Facilities Maintenance Assistant	Yes	No	Maintain and retitle
Vasquez, Cristobal R	Facilities Maintenance Worker I	Facilities Maintenance Assistant	Yes	No	Maintain and retitle
Barnes, Scott	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	Group	Maintain and retitle
Iriguchi, Lucas	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	Group	Maintain and retitle
Lam, Brian C	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	No	Maintain and retitle
Torres, Elmer	Facilities Maintenance Worker II	Facilities Maintenance Worker	Yes	No	Maintain and retitle
ZZZ-VACANT	Financial Analyst	Financial Analyst I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
Castillo, Antonio T	Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Yes	No	Maintain

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Nolen, Greg	Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Yes	No	Maintain
ZZZ-VACANT	Fleet Maintenance Supervisor	Fleet Maintenance Supervisor	Yes	No	Maintain
Hiltner, Thomas M	Grants/Legislative Analyst	Grants/Legislative Analyst	Yes	No	Maintain
ZZZ-VACANT	Human Resources Clerk	Human Resources Clerk	Yes	No	Maintain
Delfin, Flor Monik	Human Resources Generalist	Human Resources Analyst	Yes	No	Maintain and retitle
ZZZ-VACANT	Human Resources Specialist	Human Resources Specialist	Yes	No	Maintain
ZZZ-VACANT	Junior Transportation Planner	Transportation Planner I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
Brown, Ernest L	Lead Custodian (Custodial Coord)	Custodial Supervisor	Yes	Yes	Reclassify to new class based on preponderant duties
Cummins, Edward G	Lead Mechanic	Senior Mechanic	Yes	No	Maintain and retitle
Estrada, Uriel	Lead Mechanic	Senior Mechanic	Yes	No	Maintain and retitle
LoGiudice, Jason A	Lead Mechanic	Senior Mechanic	Yes	No	Maintain and retitle
MacDonell, Ryan	Lead Parts Clerk - FM	Senior Stock Clerk	Yes	No	Maintain and retitle
ZZZ-VACANT	Legal Secretary	Legal Secretary	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Alvarez-Castillo, Cesar	Mechanic I	Mechanic I	No	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Ballesteros, Ivan	Mechanic I	Mechanic I	No	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Diaz, Edward M	Mechanic I	Mechanic I	No	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Perez, Christopher D	Mechanic I	Mechanic I	Yes	Group	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Raygoza-Ramirez, Jose	Mechanic I	Mechanic I	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Villarruel Tavares, Juan M	Mechanic I	Mechanic I	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Zenteno, Daniel P	Mechanic I	Mechanic I	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Leonard, Christopher R	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Rocha, Dario	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Rocha, Luis A	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Thorn, Michael	Mechanic II	Mechanic II	Yes	Group	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Vasquez, Catalino S	Mechanic II	Mechanic II	Yes	No	Maintain ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Currea, Julio	Mechanic III	Mechanic III	Yes	Group	Maintain
Hernandez, Jaime	Mechanic III	Mechanic III	Yes	No	Maintain
ZZZ-VACANT	Paralegal	Paralegal	Yes	No	Maintain
Kegley, Rickie-Ann	Paralegal with HR Duties	Senior Paralegal	Yes	No	Maintain and retitle
Wagley, Eileen	Paratransit Eligibility Coordinator	Paratransit Eligibility Coordinator	Yes	No	Maintain
Misenheimer, Nathan L	Parts Clerk	Stock Clerk	Yes	No	Maintain and retitle
Martinez Lucio, Freddie	Payroll Specialist	Payroll Technician	Yes	No	Maintain and retitle
Brubeck, Delee	Personnel Technician	Human Resources Technician	Yes	Yes	Maintain and retitle
Hill, Cayla	Planning Analyst	Planning Data Analyst	Yes	No	Maintain and retitle
ZZZ-VACANT	Purchasing Agent	Purchasing Agent	Yes	No	Maintain
Solorio, Rina	Purchasing Assistant	Purchasing Technician	Yes	No	Maintain and retitle
Cawaling, George T	Receiving Parts Clerk	Stock Clerk	Yes	No	Reclassify based on preponderant duties
ZZZ-VACANT	Revenue Specialist	Revenue Collection Clerk	Yes	No	Maintain and retitle
Pena, Leonardo	Safety and Training Coordinator	Safety and Training Coordinator	Yes	No	Maintain

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Szestowicki, Thomas	Safety Specialist	Safety Program Specialist I	Yes	No	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Eusse-Gil, Andrea	Schedule Analyst	Scheduling Specialist	Yes	Yes	Maintain and retitle
Alcorn, Holly	Senior Accounting Technician	Accounting Technician II	Yes	No	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Martin, Dawn	Senior Accounting Technician	Accounting Technician II	Yes	No	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Woliczko, Stefan T	Senior Facilities Maintenance Worker	Senior Facilities Maintenance Worker	Yes	Yes	Maintain
Mihaylova, Kristina	Senior Financial Analyst	Financial Analyst II	Yes	No	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Ng, Jane	Senior Information Technology Technician	Information Technology Technician II	Yes	Yes	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Olander, Joy J	Senior Payroll Specialist	Senior Payroll Technician	Yes	No	Maintain and retitle
ZZZ-VACANT	Senior Safety Specialist	Safety Program Specialist I/II	No	No	Maintain and retitle; recommend flexible allocation (I/II)

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
ZZZ-VACANT	Senior Transportation Planner	Senior Transportation Planner	Yes	No	Maintain
ZZZ-VACANT	Supervising Accountant	Accountant Supervisor	Yes	No	Maintain and retitle
ZZZ-VACANT	Supervisor of Revenue Collection	Revenue Collection Supervisor	Yes	No	Maintain and retitle
Willis, Gregory A	Supervisor/Parts and Materials - FM	Parts and Materials Supervisor	Yes	Yes	Maintain and retitle
Vascones, Jordan	System Administrator	Systems Administrator I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Mayweather, Anson B	Ticket and Pass Program Specialist	Ticket and Pass Program Specialist	Yes	No	Maintain
Ayres, Chrystal L	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Berrelleza, Pablo D	Transit Supervisor	Transit Supervisor	Yes	Group	Maintain
Bibriesca, Eduardo	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Bushnell, Ron	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Castillo, Juan V	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Legorreta, Pete N	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Nevin, John C	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Pyka, Matthew	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Rios, Michael	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Seda, Delvis F	Transit Supervisor	Transit Supervisor	Yes	No	Maintain
Thompson, Elizabeth	Transit Supervisor	Transit Supervisor	Yes	Group	Maintain
ZZZ-VACANT	Transit Surveyor	Planning Program Aide	Yes	No	Maintain and retitle

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Rasmussen, Peter	Transportation Planner	Transportation Planner II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
ZZZ-VACANT	Transportation Planning Aide	Transportation Planner I/II	Yes	No	Reclassify based on preponderant duties; recommend flexible allocation (I/II)
ZZZ-VACANT	Transportation Planning Supervisor	Transportation Planning Supervisor	Yes	No	Maintain
ZZZ-VACANT	Upholsterer I	Upholsterer I/II	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II)
Mata, Joseph G	Upholsterer II	Upholsterer II	Yes	Yes	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Guerrero, Teodoro	Vehicle Service Detailer	Vehicle Service Detailer	Yes	No	Maintain
Marquez, Raymundo D	Vehicle Service Detailer	Vehicle Service Detailer	Yes	No	Maintain
Favela, Javier	Vehicle Service Technician	Senior Vehicle Service Worker	Yes	No	Maintain and retitle
Valdez, David	Vehicle Service Technician	Senior Vehicle Service Worker	Yes	No	Maintain and retitle
Garcia, Antonio Z	Vehicle Service Worker I	Vehicle Service Worker I	Yes	No	Maintain and retitle ; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy

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Full Name	Current Class Title	Proposed Class Title	PDQ Received	Interviewed (Y/N/Group)	Comments
Madrigal, Manuel	Vehicle Service Worker I	Vehicle Service Worker I	Yes	No	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Hernandez, Efrain U	Vehicle Service Worker II	Vehicle Service Worker II	Yes	Group	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Mendoza, Marisela M	Vehicle Service Worker II	Vehicle Service Worker II	Yes	No	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Perez, Eric	Vehicle Service Worker II	Vehicle Service Worker II	Yes	No	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy
Zamarripa, Jose D	Vehicle Service Worker II	Vehicle Service Worker II	Yes	Group	Maintain and retitle; recommend flexible allocation (I/II); actual incumbent level to be determined by METRO based on incumbent qualifications, flexible allocation policy



Attachment C

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Accessible Services Coordinator

Bargaining Unit: SEA

DEFINITION:

Under direction, an Accessible Services Coordinator performs program administrative and operations duties to assist the older adult and handicapped community utilize METRO paratransit and transit services; provides outreach and education to current and potential customers to encourage the use of METRO's accessible services; plans, coordinates, develops and implements METRO's Mobility Training Program; serves as a liaison and information source to customers, community agencies and the public regarding METRO accessibility services and Mobility Training; supports METRO management in ensuring that METRO's vehicles and services comply with Americans With Disabilities Act (ADA) requirements; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accessible Services Coordinator is a program coordinator level class. An incumbent in this class is primarily responsible for planning, developing, coordinating and providing METRO services to the older adult and disabled community, and for promoting such services through targeted community outreach and education.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Plans, develops, organizes and conducts services for the older adult and disabled community, ensuring their compliance with State and Federal requirements as well as METRO policies and procedures.
- Plans and implements METRO's Mobility Training Program; provides one-on-one and group mobility training and support services by teaching, demonstrating and assisting program participants and/or their supporters on the safe and proper use of the METRO bus system; meets with participants; plans and develops individualized training schedules; monitors trainee progress.
- Develops, distributes and/or modifies a variety of training procedures, methods, materials, and forms to facilitate the effective training of Mobility Training Program participants.
- Promotes and provides outreach services to the older adult and disabled communities; attends classrooms, events, and a variety of public or private meetings to present to individuals and organizations about METRO's accessibility services.
- Creates teaching materials and presents ADA-related training to METRO staff as assigned.
- Serves as a liaison and information source to customers, community agencies and the public with regard to METRO accessibility services and the Mobility Training Program.
- Works with METRO management to help ensure that METRO's vehicles and services comply with Americans With Disabilities Act (ADA) requirements.
- Reviews, investigates and responds to ADA complaints as assigned.
- Serves on committees, commissions and task forces as assigned.
- Updates and maintains information in a database; prepares regular and periodic reports for management as requested; maintains various logs, records, and lists.



Attachment C

HUMAN RESOURCES DEPARTMENT

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- Conducts research and prepares summaries of findings; initiates, composes and/or types various memos, letters, reports, statistical data, and other narrative documents; writes, updates and maintains program procedures.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax machine, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles of program organization, administration and coordination.
- Common transit agency policies and procedures associated with paratransit and standard bus operations.
- State, Federal, and local laws and regulations regarding the accessibility of transit services to the older adult and disabled community, including the Americans With Disabilities Act (ADA) and the principles guiding reasonable accommodation.
- Current practices, procedures, and philosophies pertaining to mobility training and accessibility.
- Special equipment, procedures, and opportunities available to improve the accessibility of transit services to underserved populations.
- Current instructional methods, and practices, as well as effective curriculum development.
- Customer safety and health-related considerations related to paratransit and transit services.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software, including audio/visual equipment.

Ability to:

- Plan, develop, organize and conduct an effective mobility training program for older adults and disabled individuals.
- Read and understand laws, regulations, and policies pertaining to transit accessibility.
- Conduct field work to provide direct services to customers.
- Teach ideas, concepts, and skills to older adult and disabled individuals effectively.
- Research, analyze and evaluate new teaching methods and techniques.
- Formulate specific objectives to compare and evaluate program results.
- Define problem areas and evaluate, recommend and implement alternative solutions to issues and problems.
- Instruct others in the safe utilization of METRO vehicles and services and adapt training procedures to the needs of the individual.



Attachment C

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

- Act as liaison between METRO, community groups, other transit districts, transit customers, and the public with regard to accessible services.
- Develop and write plans, procedures, reports, forms, and tests.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 30 semester (or equivalent) college units, including coursework in business administration, public administration, social services or a related field.

AND

Four (4) years of experience in program, project or administrative support. Experience must have also included at least two (2) years of experience related to accessibility and/or ADA compliance.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is often required to reach with hands and arms; sit, push and pull; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist and crouch. Occasional lifting up to 20 pounds unaided may be required. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.



Attachment C

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate. May work out in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Transit Operations

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Attachment C

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Accountant I

Bargaining Unit: SEA

DEFINITION:

Under general supervision, an Accountant I performs a limited range of professional accounting duties related to METRO financial functions and processes; analyzes and reconciles accounting records in compliance with State and Federal laws, regulations and requirements; participates in the development of METRO accounting systems and sub-systems; learns to reconcile the General Ledger and various bank records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accountant I is the first working-level class in the series. An incumbent in this class performs a limited range of professional accounting duties while learning to perform the full scope of journey-level work. This class is distinguished from the higher-level class of Accountant II because an incumbent in the latter class performs the full scope of journey-level professional accounting work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs professional operating and/or cost accounting work requiring the application of professional accounting principles to a wide variety of problems; learns to perform the full range of journey-level professional accounting work in an assigned department.
- Participates in the preparation of annual audited financial statements and notes; develops management discussion points and analysis in accordance with legal requirements.
- Participates in the annual actuarial valuation process in accordance with legal requirements.
- Reconciles the General Ledger (G/L); reconciles various bank accounts and bankcard activity; reconciles total payroll expense to payroll tax returns for audit purposes and analytics; analyzes and investigates variances; ensures proper coding of transactions.
- Participates in special accounting system development assignments, such as development of subsystems for recording of data necessary for control purposes.
- Participates in the development of METRO financial policies and procedures; provides training on new or updated procedures to Finance and other staff as needed.
- Analyzes budgetary, financial, actuarial and statistical data; makes recommendations on discount rates, funding options for pension-related liabilities, trends in contribution rates, fare revenues, and other subject matter.
- Maintains accounting records, depreciation schedules and assets purchased under Federal grants; posts accounts distribution for all revenue/grant receipts; documents grant funding sources for capital asset purchases.
- Prepares tax returns; compiles capital asset information.
- Calculates fixed asset depreciation amounts using appropriate depreciation schedules and processes.
- Analyzes expenditure data and determines reimbursements collected from the State or Federal governments.



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Santa Cruz METRO

- Analyzes and investigates variances between actual and budgeted expenditures necessitating realignment of appropriations, encumbrances and/or payments to reflect proper cost accounting within budget constraints.
- Assists in preparing cost allocation plans utilizing appropriate cost accounting procedures; calculates indirect costs and allocates the costs to the appropriate departments, sections or projects as required.
- Participates in special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, practices, forms and techniques of professional public sector accounting, finance and budgeting.
- Generally Accepted Accounting Principles (GAAP), and their application to a wide variety of accounting transactions, situations and problems.
- Laws and regulations applicable to public sector accounting.
- Principles and practices of public agency budgeting, revenue forecasting and investing.
- Business law principles and practices.
- Benefits and limitations of automated accounting applications.
- Relationships between accounting records and documents for recording and reporting purposes.
- Public sector accounting terminology and methods.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Perform a wide variety of complex, professional accounting tasks.
- Evaluate, interpret and apply accounting laws, regulations, policies, procedures and requirements to departmental financial activities.
- Perform professional accounting activities in compliance with applicable laws, regulations and policies.
- Maintain complex financial/statistical data and records.



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

- Reconcile accounts and reconstruct record trails in order to locate and correct errors or reasons for imbalance.
- Apply professional accounting control procedures to maintain budgetary accounts.
- Create and use computerized spreadsheets, databases and software to track financial information and automate calculations.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in accounting, business administration or a related field, including coursework in elementary and advanced accounting, management accounting, business law and cost accounting.

AND

One (1) year of professional accounting experience, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must participate in professional development activities.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.



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Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Financial Professional

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Accountant II

Bargaining Unit: SEA

DEFINITION:

Under direction, an Accountant II performs professional accounting duties to support METRO financial functions and processes; analyzes and reconciles accounting records for compliance with State and Federal laws, regulations and requirements; coordinates the development of METRO accounting systems and sub-systems; reconciles the General Ledger and various bank records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accountant II is the journey-level class in the series. An incumbent in this class performs the full range of professional accounting duties requiring the application of professional accounting principles to a wide variety of problems. This class may be distinguished from the lower-level class of Accountant I because an incumbent in the latter class performs a more limited range of duties while learning to perform the full scope of journey-level professional accounting work. This class may also be distinguished from the higher-level class of Accountant Supervisor because the latter is the first supervisory-level class in the series.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Coordinates and participates in the preparation of annual audited financial statements and notes; develops management discussion points and analysis in accordance with legal requirements.
- Coordinates and participates in the annual actuarial valuation process in accordance with legal requirements.
- Reconciles the General Ledger (G/L); reconciles various bank accounts and bankcard activity; reconciles total payroll expense to payroll tax returns for audit purposes and analytics; analyzes and investigates variances; ensures proper coding of transactions.
- Performs special accounting system development assignments, such as development of subsystems for recording of data necessary for control purposes.
- Develops and recommends METRO financial policies and procedures; provides training on new or updated procedures to Finance and other staff as needed.
- Analyzes budgetary, financial, actuarial and statistical data to make recommendations on discount rates, funding options for pension-related liabilities, trends in contribution rates, fare revenues, and other subject matter.
- Maintains accounting records, depreciation schedules and assets purchased under Federal grants; post accounts distribution for all revenue/grant receipts; documents grant funding source for capital asset purchases.
- Prepares tax returns; compiles capital asset information.
- Calculates fixed asset depreciation amounts using appropriate depreciation schedules and processes.
- Analyzes expenditure data and determines reimbursements collected from the State or Federal governments.



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- Analyzes and investigates variances between actual and budgeted expenditures necessitating realignment of appropriations, encumbrances and/or payments to reflect proper cost accounting within budget constraints.
- Assists in preparing cost allocation plans utilizing appropriate cost accounting procedures; calculates indirect costs and allocates the costs to the appropriate departments, sections or projects as required.
- Coordinates and performs special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, practices, forms and techniques of professional public sector accounting, finance and budgeting.
- Generally Accepted Accounting Principles (GAAP), and their application to a wide variety of accounting transactions, situations and problems.
- Laws and regulations applicable to public sector accounting.
- Principles and practices of public agency budgeting, revenue forecasting and investing.
- Business law principles and practices.
- Benefits and limitations of automated accounting applications.
- Relationships between accounting records and documents for recording and reporting purposes.
- Public sector accounting terminology and methods.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Perform a wide variety of complex, professional accounting tasks.
- Evaluate, interpret and apply accounting laws, regulations, policies, procedures and requirements to departmental financial activities.
- Perform professional accounting activities in compliance with applicable laws, regulations and policies.
- Maintain complex financial/statistical data and records.



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- Reconcile accounts and reconstruct record trails in order to locate and correct errors or reasons for imbalance.
- Apply professional accounting control procedures to maintain budgetary accounts.
- Create and use computerized spreadsheets, databases and software to track financial information and automate calculations.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in accounting, business administration or a related field, including coursework in elementary and advanced accounting, management accounting, business law and cost accounting.

AND

Three (3) years of professional accounting experience, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must participate in professional development activities.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.



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Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

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*Job Family: Financial Professional

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Accountant Supervisor

Bargaining Unit: PSA

DEFINITION:

Under direction, an Accountant Supervisor performs supervisory and advanced professional accounting duties related to METRO financial functions and processes; directs and supervises the analysis and reconciliation of accounting records for compliance with State and Federal laws, regulations and requirements; directs and supervises the development of METRO accounting systems and sub-systems; oversees the reconciliation of the General Ledger and various bank records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accountant Supervisor is the supervisory-level class in the series. An incumbent in this class performs supervisory and professional accounting work requiring the application of advanced professional accounting principles to a wide variety of problems. This class may be distinguished from the lower-level class of Accountant II because an incumbent in the latter class performs journey-level professional accounting work and does not supervise professional staff.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Supervises subordinate professional accounting staff and may supervise technical, clerical or support staff; assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Supervises and participates in the preparation of annual audited financial statements, the development of management discussion points, and various accounting analyses in accordance with legal requirements.
- Supervises and participates in the annual actuarial valuation process in accordance with legal requirements.
- Supervises the reconciliation of the General Ledger (G/L) as well as various bank accounts and bankcard activity; oversees the reconciliation of total payroll expense to payroll tax returns for audit purposes and analytics; directs and participates in the analysis and investigation of variances and ensures proper coding of transactions.
- Supervises and performs special accounting system development assignments, such as development of subsystems for recording of data necessary for control purposes.
- Supervises the development and recommendation of METRO financial policies and procedures; provides training on new or updated procedures to Finance and other staff as needed.
- Analyzes budgetary, financial, actuarial and statistical data to make recommendations on discount rates, funding options for pension-related liabilities, trends in contribution rates, fare revenues, and other subject matter.
- Maintains accounting records, depreciation schedules and assets purchased under Federal grants; posts accounts distribution for all revenue/grant receipts; documents grant funding source for capital asset purchases.



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- Oversees the preparation of tax returns and the compilation of capital asset information.
- Calculates fixed asset depreciation amounts using appropriate depreciation schedules and processes.
- Analyzes expenditure data and determines reimbursements which can be collected from the State or Federal governments.
- Analyzes and investigates variances between actual and budgeted expenditures necessitating realignment of appropriations, encumbrances and/or payments to reflect proper cost accounting within budget constraints.
- Recommends cost allocation plans utilizing appropriate cost accounting procedures; calculates indirect costs and allocates the costs to the appropriate departments, sections or projects as required.
- Coordinates and performs special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Advanced principles, practices, forms and techniques of professional public sector accounting, finance and budgeting.
- Generally Accepted Accounting Principles (GAAP), and their application to a wide variety of accounting transactions, situations and problems.
- Advanced laws and regulations applicable to public sector accounting.
- Principles and practices of public agency budgeting, revenue forecasting and investing.
- Business law principles and practices.
- Benefits and limitations of automated accounting applications.
- Relationships between accounting records and documents for recording and reporting purposes.
- Advanced public sector accounting terminology and methods.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Advanced methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:



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- Effectively supervise and motivate subordinate staff.
- Perform a wide variety of complex, professional accounting tasks.
- Evaluate, interpret and apply accounting laws, regulations, policies, procedures and requirements to departmental financial activities.
- Coordinate and perform professional accounting activities in compliance with applicable laws, regulations and policies.
- Maintain complex financial and statistical data and records.
- Reconcile accounts and reconstruct record trails in order to locate and correct errors or reasons for imbalance.
- Apply advanced professional accounting control procedures to maintain budgetary accounts.
- Create and use computerized spreadsheets, databases and software to track financial information and automate calculations.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in accounting, business administration or a related field, including coursework in elementary and advanced accounting, management accounting, business law and cost accounting.

AND

Four (4) years of professional accounting experience, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must participate in professional development activities.
- May occasionally require working extended hours or hours outside of regular schedule.



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Santa Cruz METRO

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.

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*Job Family: Financial Professional



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Accounting Clerk

Bargaining Unit: SEA

DEFINITION:

Under general supervision, an Accounting Clerk performs accounting duties to support department financial functions and processes; processes and maintains detailed financial records in computerized and hard copy files; gathers and compiles data for statistical or financial reports; provides information to employees and the public as authorized; types, files and performs general office work; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accounting Clerk is a journey-level clerical class. An incumbent in this class performs clerical accounting tasks of average difficulty that require a basic knowledge of bookkeeping principles and methods as well as general departmental policies, practices and procedures. This class may be distinguished from the higher-level class of Accounting Technician I because an incumbent in the latter class learns and performs technical accounting work that requires advanced bookkeeping skills and some formal knowledge of public accounting principles and practices.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs data entry to update and maintain financial information in an established spreadsheet, database or other computerized files; compiles and prepares data for statistical and accounting reports; creates spreadsheets and other tools to track information.
- Tracks budget expenditures by cost center; prepares budget status reports and summaries for revenue, capital and operating expenditures.
- Accepts, records and processes payments from vendors for rents and services.
- Computes grant percentages on invoices as applicable.
- Organizes and maintains fixed asset inventory files; coordinates periodic fixed asset inventory surveys.
- Receives and processes routine financial documents, including invoices and bills; prepares payment authorizations, requisitions, and check requests.
- Maintains inventories and orders supplies.
- Types memoranda, letters, reports, contracts, purchase orders, statistical data, specifications, minutes, agendas, and other documents from draft as directed.
- Maintains and updates lists and files by inserting and extracting information; may handle confidential materials, records, files and other privileged information.
- Answers telephones, greets visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.



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EMPLOYMENT STANDARDS:

Knowledge of:

- Basic bookkeeping methods.
- Basic clerical processes pertaining to accounting, purchasing, and data maintenance.
- Modern office practices, procedures and equipment.
- Basic methods of maintaining information in computerized or hard copy files.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Maintain confidentiality of materials, records, files and other privileged information using tact and discretion.
- Maintain detailed records and control systems with accuracy and attention to detail.
- Input data into a computerized database.
- Type finished copy from rough draft or machine transcription.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Three (3) years of progressively responsible clerical experience requiring the operation of personal computers, data entry, typing and maintaining detailed records. Experience must have also included at least one (1) year of clerical accounting work.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

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*Job Family: Financial Clerical



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Accounting Technician I

Bargaining Unit: SEA

DEFINITION:

Under general supervision, an Accounting Technician I performs a limited range of technical accounting duties to support department financial functions and processes while learning to perform the full-scope of journey-level technical accounting duties for an assigned department; compiles, verifies and summarizes financial and statistical data from a variety of sources; learns to process and maintain files and records for accounts payable, accounts receivable, cash receipts, fixed assets, insurance, revenue, general ledger, tax filings, and budgeting; gathers and compiles data for statistical or financial reports; reviews and processes payroll documents; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accounting Technician I is the first working-level class in the series. An incumbent in this class performs the less complex technical accounting tasks requiring interpretation and application of specialized accounting policies and procedures to ensure that assigned activities comply with various legal, regulatory, policy and other requirements. This class may be distinguished from the lower-level class of Accounting Clerk because an incumbent in the latter class performs journey-level clerical accounting work. This class may also be distinguished from the higher-level class of Accounting Technician II because an incumbent in the latter class performs the full range of journey-level, technical accounting work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs a limited range of technical accounting duties to support department financial functions and processes while learning to perform the full-scope of journey-level technical accounting duties for an assigned department.
- Administers a departmental financial record-keeping program; posts information to automated ledgers, account books, and accounting worksheets; reconciles manual records to computer-generated reports.
- Performs accounts payable duties; reviews and matches accounts payable documents such as invoices, receiving reports and purchase orders to support payment and reconcile discrepancies; reviews contracts, accounts, statements, or payments to confirm payment status, terms, pricing, and scope of work; routes payment documents for approval/signature; submits approved documents for payment.
- Tracks budget accounts and balances; monitors expenditures compared to budget allowances and notifies management if over-budget; reconciles transactions and account balances to Finance reports; reconciles departmental credit card and related charge accounts.
- Collects cash and receives, codes, processes and deposits cash receipts; reviews and processes petty cash reimbursements; enters cash receipts and other accounts receivable information into an automated accounting system and reconciles to reports; makes bank deposits; performs department petty cash and Ticket Vending Machine (TVM) audits.
- Monitors insurance policies for properties under contract with Santa Cruz METRO; tracks insurance expirations; researches contracts and leases to ensure that required endorsements are



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received and updated; reviews insurance expirations and prepares insurance billing statements for payment.

- Creates and submits a wide variety of purchase requisitions; works with vendors as needed to adjust purchase orders.
- Performs technical research relating to financial and other administrative activities; extracts and compiles data from manual and computerized sources for reports and other documents; makes computations and prepares statistical summaries and reports.
- Calculates and processes Treasury account transfers.
- Processes emergency check requests and prepares off-cycle checks.
- Reviews and processes employee attendance and payroll documents; may calculate and record hours worked, leave used, shift differentials, and other payroll provisions; researches and resolves payroll-related problems.
- Performs other technical duties in support of departmental administrative functions; researches a variety of issues and prepares summaries of findings; initiates, composes and/or prepares complex department memos, letters, reports, statistical data, and narrative documents; develops, prepares, distributes, maintains and files a variety of reports, records and documentation; maintains logs, spreadsheets, lists and files to track operational processes and information.
- Performs special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of technical accounting, including the processing of accounts payable and accounts receivable transactions and documents.
- Basic laws and regulations applicable to public sector accounting.
- Basic public sector accounting terminology and methods.
- Bookkeeping practices and procedures.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and financial data conventions.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:



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- Evaluate, interpret and apply technical accounting policies, procedures and requirements as they apply to departmental financial activities.
- Perform technical accounting activities in a manner that complies with applicable laws, regulations and policies.
- Check, balance and reconcile documents; maintain accounts payable/receivable and cash receipts.
- Apply control procedures pertaining to the maintenance of budgetary accounts.
- Maintain a variety of financial accounts, ledgers, and financial reports.
- Create and use computerized spreadsheets, databases and software to track financial information and automate calculations.
- Perform financial calculations quickly and accurately.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information using tact and discretion.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 30 semester (or equivalent quarter) units from an accredited college, including 12 units in accounting, business administration or a comparable field of coursework.

AND

Two (2) years of clerical accounting experience requiring the maintenance of computerized accounting records and the application of basic bookkeeping practices.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires



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stooping at the waist and the repetitive use of both hands to grasp and feel objects and. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Financial Clerical

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Accounting Technician II

Bargaining Unit: SEA

DEFINITION:

Under direction, an Accounting Technician II performs journey-level technical accounting duties to support department financial functions and processes; compiles, verifies and summarizes financial and statistical data from a variety of sources; processes and maintains files and records for accounts payable, accounts receivable, cash receipts, fixed assets, insurance, revenue, general ledger, tax filings, and budgeting; coordinates the review and processing of payroll documents; gathers and compiles data for statistical or financial reports; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accounting Technician II is a journey-level technical accounting class. An incumbent in this class performs tasks requiring interpretation and application of specialized accounting policies and procedures to ensure that assigned activities comply with various legal, regulatory, policy and other requirements. This class may be distinguished from the lower-level class of Accounting Technician I because an incumbent in the latter class performs a limited range of technical accounting work while learning to perform the full range of journey-level duties. It may also be distinguished from the higher-level class of Accounting Technician Specialist because an incumbent in the latter class performs advanced technical accounting work and may serve as a lead worker over subordinate technical and/or clerical staff.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Administers a departmental financial record-keeping program; posts information to automated ledgers, account books, and accounting worksheets; reconciles manual records to computer-generated reports.
- Performs accounts payable duties; reviews and matches accounts payable documents such as invoices, reports and purchase orders to support payment and reconcile discrepancies; reviews contracts, accounts, statements, or payments to confirm payment status, terms, pricing, and scope of work; routes payment documents for approval/signature; submits approved documents for payment.
- Tracks budget accounts and balances; monitors expenditures compared to budget allowances and notifies management if over-budget; reconciles transactions and account balances to Finance reports.
- Collects cash and receives, codes, processes and/or deposits cash receipts; reviews and processes petty cash reimbursements; enters cash receipt and other accounts receivable information into an automated accounting system and reconciles to reports; makes bank deposits.
- Coordinates and monitors insurance policies for properties under contract with Santa Cruz METRO; monitors insurance expirations; researches contracts and leases to ensure that required endorsements are received and updated; reviews insurance expirations and prepares insurance billing statements for payment.
- Creates and submits purchase requisitions; works with vendors as needed to adjust purchase orders.



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- Performs technical research related to financial and other administrative activities; extracts and compiles data from manual and computerized sources for reports and other documents; makes computations and prepares statistical summaries and reports.
- Performs department petty cash and Ticket Vending Machine (TVM) audits.
- Calculates and processes Treasury account transfers.
- Reconciles departmental credit card and related charge accounts.
- Processes emergency check requests and prepares off-cycle checks.
- Reviews and processes employee attendance and payroll documents; may calculate and record hours worked, leave used, shift differentials, and other payroll provisions; researches and resolves payroll-related problems.
- Develops and delivers technical training to various staff on accounts payable and budget tracking procedures.
- Performs other technical duties in support of departmental administrative functions; researches a variety of issues and prepares summaries of findings; initiates, composes and/or prepares complex department memos, letters, reports, statistical data, and narrative documents; develops, prepares, distributes, maintains and files a variety of reports, records and documentation; maintains logs, spreadsheets, lists and files to track operational processes and information.
- Coordinates and performs special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of technical accounting, including the processing of accounts payable and accounts receivable transactions and documents.
- Basic laws and regulations applicable to public sector accounting.
- Basic public sector accounting terminology and methods.
- Advanced bookkeeping practices and procedures.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Advanced methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios and percentages.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:



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- Evaluate, interpret and apply technical accounting policies, procedures and requirements as they apply to departmental financial activities.
- Coordinate and perform technical accounting activities in a manner that complies with applicable laws, regulations and policies.
- Check, balance and reconcile documents; maintain accounts payable/receivable and cash receipts.
- Apply control procedures pertaining to the maintenance of budgetary accounts.
- Maintain a variety of financial accounts, ledgers, and financial reports.
- Create and use computerized spreadsheets, databases and software to track financial information and automate calculations.
- Perform financial calculations quickly and accurately.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 30 semester (or equivalent quarter) units from an accredited college, including 12 units in accounting, business administration or a comparable field of coursework.

AND

Two (2) years of experience requiring technical bookkeeping, financial recordkeeping, and/or accounts payable and receivable work, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects and. Work may



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require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
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*Job Family: Financial Technical

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Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Accounting Technician Specialist

Bargaining Unit: SEA

DEFINITION:

Under direction, an Accounting Technician Specialist performs advanced technical accounting duties to support METRO financial functions and processes; maintains the General Ledger; performs difficult account reconciliations; prepares and maintains complex accounting records and reports; performs the more difficult accounts payable, accounts receivable, cash receipts, fixed assets, insurance, revenue, general ledger, tax filings, and budgeting activities; may serve as a lead worker over subordinate technical, clerical and support staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Accounting Technician Specialist is the advanced-level class in the series. An incumbent in this class performs tasks requiring interpretation and application of specialized accounting policies and procedures to ensure that assigned activities comply with various legal, regulatory, policy and other requirements. This class may be distinguished from the lower-level class of Accounting Technician II because an incumbent in the latter class performs the full range of journey-level technical accounting work. This class may also be distinguished from the higher-level class of Accountant I because the latter is the first professional-level accounting class.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Maintains the General Ledger (G/L); reconciles balance sheet accounts and documents and reconciles revenue and expense accounts; prepares, enters and posts journal entries into an automated accounting system; merges Accounts Receivable and Accounts Payable to flow into the G/L; closes month-end books and runs all reports including the final G/L and Financials; assists professional staff with year-end reporting and closing of accounting records.
- Reconciles the G/L cash balance to the County Treasurer's cash balance; determines and takes appropriate action to resolve variances; reconciles G/L accounts and the Accounts Payable bank balance by researching and resolving any outstanding checks that have not been cashed; reconciles the monthly check register for the Board of Director's report.
- Maintains all check journals; processes all returned checks and takes follow-up action as needed.
- Organizes, records, and retains the weekly bank deposit recaps from MetroCenter and resolves discrepancies as needed.
- Prepares all billings for tenants (utilities, pest control, late charges, etc.), advertising, unions, revenue, and other miscellaneous receivables as needed; prepares Consumer Price Index adjustments for revenue and tenant customers as needed and provides appropriate notification; collects late payments; runs monthly statements for Accounts Receivable.
- Balances all checks and cash to the receipts log for accuracy; contacts bank for Fares Sweep and writes checks; prepares affidavit and Record of Deposit from County as needed; maintains monthly record of all cash receipts and wire deposits; runs reports from the County Treasury website in accordance with established procedures; updates Board of Equalization sales tax wire information from website each month.



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- Maintains financial statements including consolidated and departmental reports for expenses and revenue.
- Assists in compiling financial data for projects as assigned; assists in the monetary petty cash count and safe contents count at MetroCenter; provides fund balance and transaction information for other staff as requested.
- May serve as a lead worker over subordinate technical, clerical or other support staff by prioritizing, assigning and monitoring their work and providing training as needed.
- Performs other technical duties in support of departmental administrative functions; researches a variety of issues and prepares summaries of findings; initiates, composes and/or prepares complex department memos, letters, reports, statistical data, and narrative documents; develops, prepares, distributes, maintains and files a variety of reports, records and documentation; maintains logs, spreadsheets, lists and files to track operational processes and information.
- Coordinates and performs special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced principles, practices, forms and techniques of technical public sector accounting, including internal controls, General Ledger maintenance/reconciliation, and advanced accounts payable, accounts receivable and cash handling practices.
- Basic laws and regulations applicable to public sector accounting.
- Relationships between accounting records and documents for recording and reporting purposes.
- Public sector accounting terminology and methods.
- Advanced bookkeeping practices and procedures.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Advanced methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Clerical customer service techniques.
- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios and percentages.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Evaluate, interpret and apply technical accounting policies, procedures and requirements as they apply to departmental financial activities.



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- Coordinate and perform technical accounting activities in a manner that complies with applicable laws, regulations and policies.
- Check, balance and reconcile documents; maintain accounts payable/receivable and cash receipts.
- Apply advanced technical control procedures to maintain budgetary accounts.
- Maintain complex financial accounts, ledgers, and financial reports.
- Create and use computerized spreadsheets, databases and software to track financial information and automate calculations.
- Perform financial calculations quickly and accurately.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Serve as a lead worker over subordinate technical, clerical and support staff.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent quarter) units from an accredited college, including coursework in accounting, business administration or a related field.

AND

Two (2) years of experience requiring journey-level technical bookkeeping, financial recordkeeping, and/or accounts payable/receivable work, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects and. Work may



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require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Financial Technical

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Administrative Assistant

Bargaining Unit: SEA

DEFINITION:

Under general supervision, an Administrative Assistant performs advanced and difficult clerical duties to relieve management staff of administrative detail; assists in the preparation of difficult and complex correspondence, reports, budget documents, and manuals; researches and compiles data from multiple and varied sources to prepare reports or complete forms; coordinates and provides administrative support during meetings; and performs other related duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Administrative Assistant is a journey-level clerical class. An incumbent in this class performs a wide range of difficult and responsible clerical duties that require advanced knowledge of administrative support practices and procedures. This class is distinguished from the lower-level class of Administrative Clerk because an incumbent in the latter class performs clerical tasks that are of routine to average difficulty. This class is also distinguished from the higher-level class of Administrative Specialist because an incumbent in the latter class performs technical administrative duties that require substantial interpretation and application of laws, regulations and/or specialized departmental and/or program policies.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Assists in the preparation of difficult and complex correspondence, reports, budget documents, manuals, detailed operating procedures, minutes, agendas, and other written materials; researches and compiles data from multiple and varied sources to prepare reports or complete forms; compiles and organizes content; selects formats, edits, and proofreads various documents; and finalizes documents.
- Prepares, monitors, and processes a variety of transactional documents including purchase requisitions, budget requests and transfers, expenditure claims, and personnel/payroll actions.
- Greets customers in person or over the telephone and directs them to appropriate officials, vendors, or departmental staff; answers inquiries on administrative matters, and provides standard forms as needed; receives complaints and resolves if possible, referring unresolvable issues to a superior.
- Schedules complex meetings involving multiple participants and/or locations; prepares and distributes agendas and meeting materials; maintains appointment calendars for management; makes complex travel arrangements.
- Enters and retrieves information from both hard copy and electronic records; designs and implements various manual and electronic tools to log, track, summarize and report information.
- Develops, maintains, and updates general administrative filing systems in accordance with departmental records retention programs; documents retention storage; creates reference material.



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- Receives and processes routine financial documents, including invoices and bills; prepares payment authorizations, requisitions and check requests; maintains a department petty cash fund; requisitions a variety of supplies, parts, and materials; maintains inventory.
- Develops and maintains mailing lists; prepares and distributes inter-office mail; prepares difficult external mailings.
- May handle sensitive or confidential materials, records, files, and other privileged information.
- Makes difficult employee travel arrangements to attend meetings, conferences, and training seminars; prepares presentation materials as directed.
- Coordinates and executes special projects and assignments.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes standard business computer software and may utilize specialized METRO software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced office practices, procedures, and equipment.
- Clerical processes pertaining to accounting, purchasing, and data maintenance.
- Methods of maintaining information in digital or hard copy files.
- Clerical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Mathematics including addition, subtraction, multiplication, division, and percentages.
- Advanced telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Interpret and apply METRO policies and labor contract provisions, including those related to payroll and employee benefits administration.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Maintain records and control systems with accuracy and attention to detail.
- Type finished copy from rough draft or machine transcription.
- Type at a corrected rate of 50 words per minute from clear copy.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.



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- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Four (4) years of progressively responsible clerical experience requiring the operation of personal computers, database systems, typing and maintaining recordkeeping systems.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
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*Revised: 00-00-00
*Job Family: Administrative Clerical



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Class Code: Class Code
FLSA Status: Pending

Administrative Clerk

Bargaining Unit: SEA

DEFINITION:

Under general supervision, an Administrative Clerk performs a limited range of general clerical duties to support departmental functions; enters data into manual and automated systems; provides telephone and public reception; types, processes and prepares documents; maintains departmental files; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Administrative Clerk is a journey-level clerical class. An incumbent in this class performs clerical tasks that are of routine to average difficulty. This class is distinguished from the higher-level class of Administrative Assistant because an incumbent in the latter class performs advanced-level clerical duties that typically include providing administrative and secretarial support to management.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Greets customers in person or over the telephone and directs them to appropriate officials, vendors, or departmental staff; answers inquiries on administrative matters, and provides standard forms as needed.
- Types reports, memoranda, records, contracts, letters, specifications, minutes, agendas and other documents; may compose routine correspondence; tabulates statistical and other data; prepares purchase requisitions as assigned; proofread and corrects grammar, punctuation, and spelling.
- Enters and retrieves information from both hard copy and electronic records; uses various manual and electronic tools to log, track, summarize and report information.
- Maintains and updates general administrative files in accordance with departmental records retention programs; documents retention storage; creates reference material.
- Receives and processes routine financial documents, including invoices and bills; prepares payment authorizations, requisitions and check requests; maintains a department petty cash fund; requisitions routine office supplies, parts, and materials and maintains a simple inventory.
- Maintains and updates mailing lists; prepares and distributes inter-office mail.
- Schedules meetings and makes routine preparations; distributes agendas and meeting materials.
- May handle sensitive or confidential materials, records, files, and other privileged information.
- Conducts routine tasks to schedule employee travel, conferences, and training seminars.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes standard business computer software and may utilize specialized METRO software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:



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- Modern office practices, procedures, and equipment.
- Basic clerical processes pertaining to accounting, purchasing, and data maintenance.
- Basic methods of maintaining information in digital or hard copy files.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Type finished copy from rough draft or machine transcription.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Type at a corrected rate of 50 words per minute from clear copy.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Two (2) years of progressively responsible clerical experience requiring the operation of personal computers, database systems, typing and maintaining recordkeeping systems.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

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*Job Family: Administrative Clerical



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HUMAN RESOURCES DEPARTMENT

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Class Code: Class Code
FLSA Status: Pending

Administrative Specialist

Bargaining Unit: SEA

DEFINITION:

Under general supervision, an Administrative Specialist performs technical administrative duties to support complex administrative or operational activities; researches, gathers, organizes and prepares data; reviews documents and data for compliance with program requirements; maintains complex files, records, reports, correspondence and other documents; prepares detailed reports regarding budgetary and funding allocations and expenditures; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Administrative Specialist is a technical administrative class. An incumbent in this class performs technical administrative duties that require substantial interpretation and application of laws, regulations and/or specialized departmental and/or program policies. This class is distinguished from the lower-level class of Administrative Assistant because an incumbent in the latter class performs advanced-level clerical rather than technical administrative duties. This class is also distinguished from the higher-level class of Administrative Supervisor as an incumbent in the latter class supervises the work of subordinate clerical and/or technical administrative staff.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Reviews a wide variety of documents and data including records, forms, correspondence, agreements, grants, contracts, operating plans, program audits, progress reports, service reports, and files, for accuracy, completeness, and compliance with program policies, procedures and requirements.
- Assists in controlling budget account ledgers; assists in researching, compiling and preparing budget proposals; prepares estimates for supply and equipment requirements for budgetary purposes.
- Develops, maintains, and updates administrative procedures; classifies correspondence, reports, documents, publications, and other material in accordance with established index systems; reviews dated files to purge or combine materials; updates index and cross reference files.
- Provides input regarding the design, organization, retrieval, and reporting functions for information management systems; conducts studies to determine the feasibility of modifying administrative systems and procedures to improve efficiencies of automated records processing.
- Collects, complies, and organizes data for reports, recommendations, policies, and special projects for State and Federal agencies, as well as the public; collects, assembles, and interprets data related to project and program operations.
- Composes and prepares correspondence and reports; prepares detailed narrative, oral, statistical and graphic reports; provides information and explains policies to staff and other agencies; researches and prepares responses as directed; maintain complex files and record-keeping systems.



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- Receives, reviews, and processes requests and complaints from other departments, members of the public, and other agencies; researches information to assist management in formulating a response.
- Conducts and coordinates technical administrative studies and projects concerning METRO policies, procedures, programs or grants; assists in planning, implementing, and evaluating administrative tools and opportunities for process improvement; makes recommendations on proposed methods and procedures.
- Designs and develops measurement tools or techniques to assess needs, services, and program effectiveness; develop questionnaires and forms to gather, organize, and tabulate data and information; investigates, studies, and composes reports pertaining to operating procedures and administrative problems.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes standard business computer software and may utilize specialized METRO software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Technical principles, practices, and procedures common to public administration, including budgeting, records management, purchasing, human resources administration, and the use of technology.
- Basic and regulations applicable to the area of assignment.
- Advanced administrative and office practices, procedures and equipment, including the use of automated information systems to improve administrative practices.
- Technical processes pertaining to accounting, purchasing, and data maintenance.
- Advanced business correspondence, formatting and report writing.
- Technical methods of researching, gathering, organizing and reporting data.
- Advanced methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- Advanced telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Evaluate, interpret and apply policies, regulations, and requirements as they apply to technical administrative activities.
- Interpret and apply policies, procedures, and Federal and/or State regulations to comply with program or project reporting requirements and organize data into functional reports.
- Coordinate and perform technical administrative activities in a manner that complies with applicable laws, regulations, and policies.
- Investigate and document administrative, operational, and programmatic problems.



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- Work independently using good judgment, tact, and discretion.
- Review and screen documents for minimum qualifications or other requirements.
- Maintain confidentiality of materials, records, files, and other privileged information
- Interpret, explain and apply human resources policies, procedures and regulations.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent quarter) units at an accredited college with coursework in human resources management, industrial relations, public administration, business administration, or a related field.

AND

Three (3) years of responsible administrative experience performing program monitoring and reporting, including responsibility for complex records retention and filing.

Experience in a public agency is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands



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While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
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*Job Family: Administrative Technical

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Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Administrative Supervisor

Bargaining Unit: SEA

DEFINITION:

Under direction, an Administrative Supervisor performs supervisory and technical duties to support complex administrative or operation activities; supervises the work of subordinate clerical and/or technical administrative personnel; researches, gathers, organizes and prepares data; reviews documents and data for compliance with program requirements; maintains complex files, records, reports, correspondence and other documents; prepares detailed reports regarding budgetary and funding allocations and expenditures; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Administrative Supervisor is a supervisory administrative class. In addition to assigned supervisory responsibilities, an incumbent in this class performs the full range of clerical and technical administrative duties performed by subordinate staff. This class is distinguished from the lower-level class of Administrative Specialist because the incumbent supervises the work of subordinate employees.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Supervises the work of subordinate staff; schedules, assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Determines work procedures; assesses subordinates' workload; plans and prepares schedules; prioritizes assignments and expedites the workflow of the unit.
- Assesses short and long-term staff development needs; develops and implements appropriate training for staff.
- Develops, maintains, and implements administrative procedures and instructs staff in their use; recommends forms; classifies correspondence, reports, documents, publications, and other material in accordance with established index systems; reviews dated files to purge or combine materials; updates index and cross reference files.
- Maintains control of budget account ledgers; researches, compiles and prepares budget proposals; prepares estimates for supply and equipment requirements for budgetary purposes.
- Provides input regarding the design, organization, retrieval, and reporting functions for information management systems; conducts studies to determine the feasibility of modifying administrative systems and procedures to improve efficiencies of automated records processing.
- Collects, compiles, and organizes data for reports, recommendations, policies, and special projects for State and Federal agencies, as well as the public; collects, assembles, and interprets data related to project and program operations.
- Composes and prepares correspondence and reports; prepares detailed narrative, oral, statistical and graphic reports; provides information and explains policies to staff and other agencies; researches and prepares responses as directed; maintain complex files and record-keeping systems.



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- Receives, reviews, and processes requests and complaints from other departments, members of the public, and other agencies; researches information to assist management in formulating a response.
- Conducts and coordinates technical administrative studies and projects concerning METRO policies, procedures, programs or grants; assists in planning, implementing, and evaluating administrative tools and opportunities for process improvement; makes recommendations on proposed methods and procedures.
- Designs and develops measurement tools or techniques to assess needs, services, and program effectiveness; develop questionnaires and forms to gather, organize, and tabulate data and information; investigates, studies, and composes reports pertaining to operating procedures and administrative problems.
- Performs general clerical and secretarial work to support management as required.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes standard business computer software and may utilize specialized METRO software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Technical principles, practices, and procedures common to public administration, including budgeting, records management, purchasing, human resources administration, and the use of technology.
- Basic and regulations applicable to the area of assignment.
- Advanced administrative and office practices, procedures and equipment, including the use of automated information systems to improve administrative practices.
- Technical processes pertaining to accounting, purchasing, and data maintenance.
- Advanced business correspondence, formatting and report writing.
- Technical methods of researching, gathering, organizing and reporting data.
- Advanced methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- Advanced telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Supervise and motivate subordinate staff effectively.
- Evaluate, interpret and apply policies, regulations, and requirements as they apply to technical administrative activities.



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- Interpret and apply policies, procedures, and Federal and/or State regulations to comply with program or project reporting requirements and organize data into functional reports.
- Coordinate and perform technical administrative activities in a manner that complies with applicable laws, regulations, and policies.
- Investigate and document administrative, operational, and programmatic problems.
- Work independently using good judgment, tact, and discretion.
- Review and screen documents for minimum qualifications or other requirements.
- Maintain confidentiality of materials, records, files, and other privileged information
- Interpret, explain and apply human resources policies, procedures and regulations.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent quarter) units at an accredited college with coursework in human resources management, industrial relations, public administration, business administration, or a related field.

AND

Four (4) years of responsible administrative experience performing program monitoring and reporting, including responsibility for complex records retention and filing. Experience must have included at least one year at a technical administrative level.

Experience in a public agency is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands



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While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

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*Job Family: Administrative Technical



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Benefits Technician

Bargaining Unit: SEA

DEFINITION:

Under general supervision, the Benefits Technician performs technical administrative duties to coordinate, maintain and administer employee, retiree and COBRA benefits programs in the Human Resources (HR) Department; assists in the administration, implementation, and modification of employee benefit programs; acts as liaison between the Santa Cruz METRO, employees, insurance carriers, contractors, and others; may assist with other HR technical functions in support of recruitment, records administration, employee relations, classification, compensation, staff development and/or other activities; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Benefits Technician is a journey-level technical administrative class. An incumbent in this class performs tasks requiring interpretation and application of specialized HR policies related to the administration and maintenance of employee, retiree and COBRA benefits while ensuring that assigned activities comply with various legal, regulatory, policy and other requirements.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Coordinates, organizes and conducts technical benefits-related activities following established procedures.
- Processes all benefit enrollment and billing for new, active, retiring, and separating employees; maintains and monitors benefit programs for compliance with insurance contracts and labor contracts; provides information related to benefit plans including medical, dental, vision, life, long term disability insurance, Employee Assistance Program, and others.
- Develops, prepares, and presents the benefits portion of the new employee orientation program; determines initial and ongoing eligibility for benefit programs; schedules and conducts offsite open enrollment meetings.
- Assists in the administration, implementation, and modification of employee benefit and insurance programs with contractors and carriers; coordinates and monitors employee benefit programs, enrollments, and expenses related to the Santa Cruz METRO budget; assists in maintaining State, Federal, and other regulatory compliance for all employee benefit programs.
- Participates in reviewing benefit programs and insurance plan documents, proposals, bids, specifications, forms, announcements and other benefit related technical documents.
- Provides cost and enrollment information to Finance as requested to assist in the preparation of the Santa Cruz METRO annual budget; monitors insurance premiums and other benefit-related administrative expenses; audits, reviews, corrects, and prepares billing documentation for payment.
- Serves as a liaison on employee benefits issues between HR, employees, retirees, terminated employees, dependents, beneficiaries, Santa Cruz METRO departments, insurance carriers, contractors, and others; prepares claim forms; monitors employee leave reports for benefit tracking purposes.



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- Coordinates with Payroll on benefit deductions and 457 Plan annual contribution limits.
- Audits payroll reports for benefits-related errors; verifies that proper health and life insurance deductions have been taken; conducts research as needed; notifies employees of errors and monies owed; creates payroll deduction forms for payroll; collects checks and provides to Finance.
- Updates and maintains benefits and other information in the computerized METRO Human Resources Information System (HRIS); conducts HRIS queries and prepares regular and periodic reports for management as requested; maintains various logs and lists.
- Performs technical research and prepares summaries of findings; initiates, composes and/or types various department memos, letters, reports, statistical data, and other narrative documents; writes, updates and maintains department procedures and procedure manuals.
- May perform other HR technical duties in support of recruitment, records administration, employee relations, classification, compensation, staff development and/or other activities.
- May supervise subordinate clerical and/or other support staff by scheduling, assigning, directing and evaluating their work; provides staff training as needed; may perform and/or have significant input into subordinate staff selection and disciplinary action.
- Maintains confidential materials, records, files, and other privileged information.
- May monitor expenditures and prepare payment authorizations.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax machine, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Technical principles, practices, and procedures common to public employment, including employee benefits and insurance programs.
- Basic laws and regulations applicable to public agency benefits administration.
- Modern office practices, procedures, and equipment, including automated human resources information systems.
- Technical processes pertaining to accounting, purchasing, and data maintenance.
- Business correspondence, formatting and report writing.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Advanced time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Advanced telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.



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Ability to:

- Evaluate, interpret and apply human resources policies, regulations, and requirements, particularly those applicable to the administration of employee benefits.
- Coordinate and perform technical human resources activities in a manner that complies with applicable laws, regulations, and policies.
- Work independently using good judgment, tact, and discretion.
- Maintain confidentiality of materials, records, files, and other privileged information
- Interpret, explain and apply human resources policies, procedures and regulations.
- Gather, record and summarize data in a variety of formats.
- Develop and maintain records and control systems with accuracy and attention to detail.
- Supervise the work of subordinate clerical and/or support staff.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Five (5) years of progressively responsible clerical experience requiring the operation of personal computers, database systems, typing and maintaining detailed recordkeeping systems. Experience must have also included at least three (3) years of benefits administration experience in a centralized human resources organization.

Recent experience is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is often required to reach with hands and arms; walk and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, kneel, crouch, and stand. Occasional lifting up to 25 pounds unaided may be required. Specific visual



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abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; uses basic math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally require working extended hours or hours outside of regular schedule.

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*Job Family: Administrative Technical

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Claims Technician I

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Claims Technician I performs a limited range of technical duties to support METRO risk management functions and activities while learning to perform the full scope of journey-level duties; receives, reviews, and processes injury and property damage claims to assist METRO Counsel with the determination of District liability; uses established procedures to conduct field investigations of accidents/incidents as well as claims and litigation filed against METRO; assists with administering settlements and property recovery activities for routine liability claims based on established parameters; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Claims Technician I is the first working-level class of the series. An incumbent in this class performs the more routine technical office and field tasks requiring basic interpretation and application of department policies and procedures and specialized investigative skills. This class may be distinguished from the higher-level class of Claims Technician II because an incumbent in the latter class performs the full scope of journey-level technical claims work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs routine technical duties to support METRO risk management functions and activities while learning to perform the full scope of journey-level duties.
- Receives, reviews and processes injury and property damage claims to assist in the determination of District liability; collects and records accident/incident information; organizes materials and establishes/maintains claim files; verifies medical treatment expenses and lost wages; compiles data on the value of property damage.
- Maintains and tracks the status of claims and prepares regular status reports.
- Conducts field investigations of accidents/incidents using established procedures; interviews and takes statements of claimants, employees, and witnesses; visits accident scenes and takes pictures and measurements; examines and documents property damage; gathers injury and other pertinent information; observes and documents hazards found during investigations.
- Assists in preparing discovery documents and performing investigation tasks related to litigation files; assists at trials, hearings, and other legal proceedings as required.
- Administers recovery actions for property damages sustained by the District from vehicle accidents, tenant lease agreements, and other related expenses.
- Administers routine settlements or other actions on litigated and non-litigated claims within established limits; may participate in negotiations.
- May represent the District as a witness in small claims court hearings; prepares and provides appropriate information and required documentation.
- Operates field investigation tools including photographic equipment; operates District vehicles, computer programs and equipment, and other office machines.



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- Performs other technical duties in support of departmental administrative functions; researches issues and prepares summaries of findings; initiates, composes and/or prepares memos, letters, reports, statistical data, and narrative documents; develops, prepares, distributes, maintains and files a variety of reports, records, and documentation; maintains logs, spreadsheets, lists and files to track processes and information.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and other equipment; operates field investigation tools including photographic equipment.
- Utilizes standard business software in performing job tasks; may utilize specialized METRO software.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Basic laws relating to property and liability claims, including contributory negligence theories.
- Basic California judicial system procedures related to liability claims.
- Basic medical and legal terminology and related documents.
- Claims investigation methods and techniques, including methods of negotiating settlements.
- Interviewing principles and techniques.
- Field procedures and techniques for collecting evidence at accident/incident sites.
- Safety regulations pertaining to hazardous materials at an accident/incident site.
- Basic discovery techniques.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Understand and apply laws and administrative policies and procedures in the evaluation of routine property and liability insurance claims.
- Investigate and recommend settlement of routine property and liability claims.
- Investigate accident scenes, analyze events and draw sound conclusions.
- Interview witnesses on the telephone and in person.
- Prepare files, documents, charts, reports, and correspondence.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.



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- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent) units from an accredited college including coursework in paralegal studies, risk management, claims resolution, business law, law enforcement, business administration or a related field of coursework.

AND

Six (6) months of experience performing property and liability claims investigation.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must be fluent in both English and Spanish.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee frequently works in a standard office environment where the noise level is usually moderate. Field work is occasionally required.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

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*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Administrative Technical

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Claims Technician II

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Claims Technician II performs technical duties to support METRO risk management functions and activities; receives, reviews and processes injury and property damage claims to assist METRO Counsel with the determination of District liability; uses established procedures to conduct field investigations of accidents/incidents claims and litigation filed against METRO; administers settlements for routine liability claims based on established parameters; administers property recovery activities; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Claims Technician II is the journey-level class of the series. An incumbent in this class performs the full scope of journey-level technical office and field tasks requiring interpretation and application of department policies and procedures and specialized investigative skills. This class may be distinguished from the lower-level class of Claims Technician I because an incumbent in the latter class performs a limited range of technical claims duties while learning to perform the full range of journey-level work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs journey-level technical duties to support METRO risk management functions and activities.
- Receives, reviews and processes injury and property damage claims to assist in the determination of District liability; collects and records accident/incident information; organizes materials and establishes/maintains claim files; verifies medical treatment expenses and lost wages; compiles data on the value of property damage.
- Maintains and tracks the status of claims and prepares regular status reports.
- Conducts field investigations of accidents/incidents using established procedures; interviews and takes statements of claimants, employees, and witnesses; visits accident scenes and takes pictures and measurements; examines and documents property damage; gathers injury and other pertinent information; observes and documents hazards found during investigations.
- Assists in preparing discovery documents and performing investigation tasks related to litigation files; assists at trials, hearings, and other legal proceedings as required.
- Administers recovery actions for property damages sustained by the District from vehicle accidents, tenant lease agreements and other related expenses.
- Administers routine settlements or other actions on litigated and non-litigated claims within established limits; may participate in negotiations.
- May represent the District as a witness in small claims court hearings; prepares and provides appropriate information and required documentation.
- Operates field investigation tools including photographic equipment; operates District vehicles, computer programs and equipment, and other office machines.
- Performs other technical duties in support of departmental administrative functions; researches issues and prepares summaries of findings; initiates, composes and/or prepares memos, letters,



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reports, statistical data, and narrative documents; develops, prepares, distributes, maintains and files a variety of reports, records, and documentation; maintains logs, spreadsheets, lists and files to track processes and information.

- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and other equipment; operates field investigation tools including photographic equipment.
- Utilizes standard business software in performing job tasks; may utilize specialized METRO software.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Basic laws relating to property and liability claims, including contributory negligence theories.
- Basic California judicial system procedures related to liability claims.
- Basic medical and legal terminology and related documents.
- Claims investigation methods and techniques, including methods of negotiating settlements.
- Interviewing principles and techniques.
- Field procedures and techniques for collecting evidence at accident/incident sites.
- Safety regulations pertaining to hazardous materials at an accident/incident site.
- Basic discovery techniques.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Understand and apply laws and administrative policies and procedures in the evaluation of routine property and liability insurance claims.
- Investigate and recommend settlement of routine property and liability claims.
- Investigate accident scenes, analyze events and draw sound conclusions.
- Interview witnesses on the telephone and in person.
- Prepare files, documents, charts, reports, and correspondence.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.



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- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent) units from an accredited college including coursework in paralegal studies, risk management, claims resolution, business law, law enforcement, business administration or a related field of coursework.

AND

Two (2) years of experience performing property and liability claims investigation.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must be fluent in both English and Spanish.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee frequently works in a standard office environment where the noise level is usually moderate. Field work is occasionally required.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Administrative Technical

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Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Custodial Service Worker **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Custodial Service Worker performs janitorial and related tasks at METRO facilities; keeps facility interiors and exteriors clean and orderly; performs minor building maintenance duties; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Custodial Service Worker is the journey-level class in the series. An incumbent in this class performs janitorial and routine facility maintenance duties necessary to maintain clean, sanitary, and safe conditions in various METRO facilities.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Cleans floors, including sweeping, spot cleaning, dust mopping, and periodic scrubbing and waxing as needed; operates buffers, carpet cleaners, floor strippers, and steam cleaning equipment as needed.
- Washes walls, ceilings, and partitions, using wall brushes, mops, cloths, and cleaning solutions.
- Wipes and dusts furniture, doors, walls, ledges, posts, benches, signs, and coin equipment.
- Collects trash from bus passenger and landscaped areas; empties and disinfects trash receptacles; disposes of waste paper and other discards; empties and cleans recycling containers.
- Cleans restrooms and toilet facilities using cleansers and sanitizing solutions, brushes, cloths, and squeegees; stocks restroom supplies.
- Removes graffiti from various surfaces.
- Cleans interior and exterior windows.
- Sanitizes drinking fountains.
- Posts and removes public informational material.
- Conducts safety checks by observing and checking locked doors, temperature readings for heating and air conditioning, and on/off switches for machines.
- Creates proper dilutions of cleaning solutions.
- Performs routine maintenance on janitorial equipment, tools, and machinery; checks and maintains equipment fuel and oil levels; may make minor repairs as needed.
- May perform minor plumbing, painting, electrical, grounds or related maintenance tasks as assigned.
- May assist with preparations for meetings and events; may perform special cleaning tasks; may set up, move and/or arrange furniture or equipment.
- Reports safety, sanitary and fire hazards; addresses immediate hazards appropriately until repairs/corrections can be made.
- Maintains custodial closets and custodial storage areas in a neat and orderly fashion.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.



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EMPLOYMENT STANDARDS:

Knowledge of:

- Acceptable standards for the cleaning and routine maintenance of public facilities.
- Commercial cleaning practices, supplies, and equipment.
- Basic operation of janitorial equipment such as buffers, carpet cleaners, floor strippers, and other cleaning equipment.
- General safety practices related to janitorial work.
- Basic mathematical skills to create proper dilutions of cleaning products.
- Proper use of cleaning tools, equipment, and supplies, including the use of various chemicals.
- Methods of prioritizing, planning and organizing complex projects and analytical work.
- Basic time management techniques.
- Basic building and grounds maintenance techniques, including routine plumbing, painting, electrical and landscaping activities.

Ability to:

- Understand and follow oral and written directions.
- Perform a wide variety of janitorial and routine facility maintenance duties in an effective and safe manner.
- Safely operate janitorial equipment.
- Safely use chemical cleaning agents.
- Use basic mathematical skills including addition, subtraction, multiplication, division, and fractions.
- Work with moderate independence using good judgment, tact, and discretion.
- Adhere to established work schedules and timelines.
- Interact effectively and courteously with the public.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Two (2) years of experience performing janitorial and cleaning tasks.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands



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While performing the duties of this job, the employee is often required to reach with hands and arms; walk, stand and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects. The employee is regularly required to stoop at the waist, kneel, crouch, crawl and climb. Occasional lifting up to 25 pounds unaided may be required. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; uses basic mathematical skills; solves routine problems; deals with multiple concurrent tasks; and interacts with others encountered during work.

Work Environment:

The employee works in various facilities where there is frequent exposure to moving mechanical parts and is occasional exposure to hot, wet and/or humid conditions, fumes, toxic or caustic chemicals. The noise level is usually moderate. The employee is occasionally exposed to varied weather conditions.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Custodial



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Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Custodial Supervisor **Bargaining Unit: PSA**

DEFINITION:

Under direction, a Custodial Supervisor performs supervisory and related work to ensure the cleanliness and routine maintenance of METRO facilities; ensures the training of new employees in proper custodial procedures including the use of manually operated tools, electrically-powered machines, cleaning compounds, solvents and chemicals; oversees the ordering of supplies, inspection of equipment and maintenance of inventory; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Custodial Supervisor is the supervisory-level class in the series. An incumbent in this class is responsible for supervising the work of custodial staff in the performance of janitorial and routine facility maintenance duties necessary to maintain clean, sanitary, and safe conditions in various METRO facilities. This class is distinguished from the lower-level class of Senior Custodial Service Worker because an incumbent in the latter class serves as a lead worker over subordinate Custodial Service Workers.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Supervises the work of subordinate staff; schedules, assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Enforces department rules and policies regarding employee conduct.
- Ensures that assigned functions meet the needs of the department and comply with established laws, regulations, policies, procedures, and standards; ensures that subordinates' work complies with Cal-OSHA regulations; determines and directs corrective measures as necessary.
- Inspects METRO facilities to ensure compliance with standards of cleanliness and maintenance and verify appropriate health and safety conditions; inspects equipment and tools to ensure proper maintenance and operating condition; documents inspection findings; advises staff of needed corrections.
- Ensures that facilities are cleaned in time for scheduled meetings or other activities.
- Oversees the acquisition of materials, equipment and supplies and the maintenance of sufficient inventory to meet anticipated needs.
- Communicates with vendors and suppliers; evaluates new custodial supplies and equipment by testing items and recommending the appropriateness of usage.
- Coordinates special custodial projects.
- Develops and revises work forms as needed.
- Prepares administrative records and reports; reviews employee time sheets and monitors employee absences.
- Monitors and oversees budgets for custodial staff and supplies; prepares justifications for staffing changes and other expenditures.



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- Stays current on commercial janitorial practices and standards; attends conferences, meetings, and training as assigned.
- Responds to emergency conditions as required by the situation; assumes responsibility for the situation until emergency assistance arrives.
- Performs the duties of Custodial Service Workers as required.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Acceptable standards for the cleaning and routine maintenance of public facilities.
- Applicable laws, regulations, policies, procedures and general safety practices related to janitorial work.
- Standard and specialized equipment, parts, tools and supplies required for commercial janitorial work.
- Operation of janitorial equipment such as buffers, carpet cleaners, floor strippers, and other cleaning equipment.
- Commercial cleaning practices, supplies, and equipment.
- Proper use of various cleaning chemicals.
- Basic building and grounds maintenance techniques, including routine plumbing, painting, electrical and landscaping activities.
- Basic operation and maintenance of heating and ventilating equipment.
- Standard tools, terminology, and practices used in skilled maintenance trades.
- Methods of prioritizing, planning and organizing work.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in digital or hard copy files.
- Time management techniques.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Supervise and motivate subordinate staff effectively.
- Supervise and perform a wide variety of janitorial and routine facility maintenance duties in an effective and safe manner.
- Interpret, explain, implement and enforce relevant policies, regulations, and requirements.
- Plan and prioritize staffing and required work priorities.
- Ensure the safe operation of janitorial equipment.
- Ensure the safe use of chemical cleaning agents.



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- Interact effectively and courteously with the public and address customer complaints in a sensitive and tactful manner.
- Prepare a variety of operational reports and maintain work records.
- Work independently using good judgment, tact, and discretion.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a METRO vehicle to perform assignments as required.
- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Four (4) years of commercial custodial experience. Experience must also have included at least two (2) years of lead worker experience.

Previous supervisory experience is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is often required to reach with hands and arms; walk, stand and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects. The employee is regularly required to stoop at the waist, kneel, crouch, crawl and climb. Occasional lifting up to 25 pounds unaided may be required. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; uses basic mathematical skills; solves routine problems; deals with multiple concurrent tasks; and interacts with others encountered during work.

Work Environment:



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The employee works in various facilities where there is frequent exposure to moving mechanical parts and is occasional exposure to hot, wet and/or humid conditions, fumes, toxic or caustic chemicals. The noise level is usually moderate. The employee is occasionally exposed to varied weather conditions.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Custodial

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Customer Service Representative

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Customer Service Representative performs clerical and customer service work related to the provision of information and assistance regarding transit services to customers; participates in transit-related special projects which may include marketing, public information, and community outreach activities; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Customer Service Representative is the journey level class in the series. An incumbent in this class performs a variety of customer service functions in a call center or information booth and may assist with outreach/public relations functions. This class may be distinguished from the higher-level class of Senior Customer Service Representative because an incumbent in the latter class serves as a lead worker over subordinate customer service staff.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs a variety of sales and cashiering activities using print encoding media (PEMs) and/or selling transit tickets, passes, and coupons; operates a cash register and performs credit card transactions; takes photographs of customers for purposes of creating identification badges; reconciles booth sales.
- Provides information to the public regarding transit services, including the location of bus stops, routes, detours, fares, transfers, and policies; responds to inquiries about pass eligibility, photo identification, lost and found, and bus schedule publication and distribution.
- Creates ride reservations for Paratransit-eligible customers; negotiates trip options and times with customers and their service providers; calculates fares, arranges for client call-backs; processes cancellations and no-shows; maintains related records and documentation.
- Receives and responds to public information requests; receives and processes compliments, complaints and service improvement suggestions.
- Participates in outreach and public relations activities and may represent METRO at special events; may assist with the design and preparation of brochures, informational flyers, written articles, and news releases.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; operates a cash register and photography equipment; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Modern office practices, procedures, and equipment, including multi-line telephone systems.



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- Applicable Federal, State, and local laws and regulations pertaining to Department of Transportation regulations and policies governing Americans with Disabilities Act (ADA) Fixed Route and Paratransit service.
- Regulations, policies, and procedures affecting METRO customers.
- Specialized scheduling software.
- Local and regional transportation services.
- Principles and methods of currency counting and cash record-keeping.
- Effective customer service techniques.
- Public speaking techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Provide information to the public in a clear, accurate and effective manner.
- Count and record currency and passenger fare receipts accurately and safely, in accordance with established procedures.
- Demonstrate excellent public relations skills, obtaining and providing information in a clear, accurate and professional manner.
- Communicate detailed information about local and regional transit systems, including routes and scheduling.
- Address customer complaints in a sensitive and tactful manner.
- Assist with designing and preparing a variety of public information, marketing, and planning materials and presentations.
- Maintain a calm demeanor in stressful situations.
- Maintain confidentiality of materials, records, files and other privileged information using tact and discretion.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a METRO vehicle to perform assignments as required.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Utilize specialized equipment such as ticketing machines, cash registers, and photo identification printers.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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



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Education, Training and Experience:

One (1) year of progressively responsible clerical customer service experience in a call center or telephone sales environment.

Experience processing cash transactions is desirable.

Fluency in English and Spanish is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee may work in a standard office, call center or information booth environment where the noise level is usually moderate. May work in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Customer Service



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Customer Service Supervisor

Bargaining Unit: PSA

DEFINITION:

Under direction, a Customer Service Supervisor performs supervisory and customer service work by overseeing and directing the day-to-day functions of the Customer Service Department; provides a variety of information and assistance to customers related to transit services; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Customer Service Supervisor is the supervisory level class in the series. An incumbent in this class performs tasks that ensure the day-to-day customer service functions are performed in an effective manner by overseeing and directing staff. This position may be distinguished from the lower-level class of Senior Customer Service Representative because an incumbent in the latter class serves as a lead worker over subordinate Customer Service Representatives and performs the more difficult customer service duties.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Supervises subordinate staff; assigns, directs, and monitors work; provides staff training; evaluates employee performance; initiates or has significant input into disciplinary actions.
- Schedules customer service work assignments ensuring adequate coverage for all functions; monitors customer interactions, including customer calls, to ensure quality customer service.
- Participates in the recruitment, selection, and on-boarding process of new departmental employees.
- Directs the cash handling activities of customer service staff; balances, reconciles and reports on daily, weekly, and quarterly sales; works with bank to obtain weekly change orders; works with Finance department to ensure internal controls for verifying cash balances and other departmental financial records; may assist with the creation of and/or provide data for financial reports.
- Oversees a variety of departmental programs and services, including Lost and Found services, identification card services, distribution of transit schedules and supplementary route information, school presentations, and other customer service activities.
- Assists in the design, scheduling, implementation, and administration of a variety of special projects, programs and events related to METRO's community outreach and public information.
- Reviews, responds to, and resolves customer service complaints in a timely manner, including those escalated by lower level staff; ensures complaints are forwarded to appropriate departments as needed.
- Coordinates with other METRO departments for needed supplies, equipment, repairs, updates, or other assistance, as needed; orders and purchases materials and supplies for department, as assigned.



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- Develops and prepares a variety of reports, internal documents, records, forms, files, statistical data, policies and procedures, as assigned.
- Performs the functions of subordinate staff, as required.
- Makes mathematical calculations.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Modern office practices, procedures, and equipment, including multi-line telephone systems.
- Applicable Federal, State, and local laws and regulations pertaining to Department of Transportation regulations and policies governing Americans with Disabilities Act (ADA) Fixed Route and Paratransit service.
- Regulations, policies, and procedures affecting METRO customers.
- METRO labor contracts.
- Local and regional transportation services.
- Advanced customer service techniques.
- Money handling procedures including the accurate and safe counting of large sums of cash.
- Advanced telephone techniques and etiquette.
- Public speaking techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Supervise and motivate subordinate staff effectively.
- Demonstrate excellent public relations skills, obtaining and providing information in a clear, accurate and professional manner.
- Communicate detailed information about local and regional transit systems, including routes and scheduling.
- Address customer complaints with tact, discretion, and good judgment.
- Maintain a calm demeanor in stressful situations.
- Count and record currency and receipts accurately and safely, in accordance with established procedures.
- Prepare deposits.
- Assist with designing and preparing a variety of public information, marketing, and planning materials and presentations.
- Drive a METRO vehicle to perform assignments as required.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.



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- Utilize specialized equipment such as ticketing machines, cash registers, and photo identification printers.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent) units from an accredited college with coursework in business administration, communications, public relations, or a related field.

AND

Two (2) years of progressively responsible clerical customer service experience equivalent to a Senior Customer Service Representative with Santa Cruz Metro.

OR

Three (3) years of progressively responsible clerical customer service experience equivalent to a Customer Service Representative with Santa Cruz Metro.

Previous experience serving as a lead worker and fluency in Spanish are desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:



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The employee may work in a standard office, call center or information booth environment where the noise level is usually moderate. May work in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Customer Service

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Electronic Technician

Bargaining Unit: VMU

DEFINITION:

Under general supervision, an Electronic Technician performs technical work related to the installation, maintenance, repair, and replacement of electronic systems and devices located in METRO vehicles and facilities; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Electronic Technician is a journey-level technician class. An incumbent in this class performs tasks to ensure electronic systems and devices related to METRO's vehicles, equipment, and facilities are maintained in an operational and safe condition.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs a variety of skilled tasks in the installation, maintenance, modification, diagnosis, and repair of electronic, computer-based and related systems and devices located in METRO vehicles and facilities; installs, tests, diagnoses, repairs, and/or removes a variety electronic equipment including fare boxes, Ticket Vending Machines (TVM), destination signs, and communication devices; ensures completed work adheres to required specification and standards.
- Designs and fabricates mounting devices to install electronic devices, as needed; may modify electronic components and devices for use on METRO vehicles and in METRO facilities.
- Schedules and performs preventative maintenance tasks for electronic systems and devices; establish preventative maintenance schedules based on manufacturers guidelines; researches and maintains information and documents related to preventative maintenance, defects, and repairs.
- Maintains records of preventative maintenance, modifications, and repairs performed on electronic equipment, including work performed and parts and materials used; establishes component duty-cycle intervals.
- Ensures METRO service manuals are current; maintains and organizes updated manufacturers' specifications; provides updates to other staff related to parts and material changes and/or substitutions.
- Works with Purchasing and the Parts Department to establish and maintain sufficient inventory of parts and materials in order to maintain METRO electronic equipment without significantly impacting operations.
- Provide information, assistance, and training to other staff regarding the installation, use, maintenance, and repair of electronic systems and components.
- Oversees and inspects the work of contractors and vendors working on electronic equipment, as assigned.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes standard business computer software and may utilize specialized METRO software in performing job tasks.



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- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Diagnostic, maintenance and repair techniques and procedures related to electrical systems, equipment, and devices.
- Principles and practices of preventive maintenance for electronic equipment, devices, and systems.
- Safe work practices in the shop and the field.
- Methods, materials, test equipment and tools used in the diagnosis, repair, installation, and maintenance of electrical systems, devices and equipment.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Mathematics including addition, subtraction, multiplication, division, and percentages.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Effectively test, diagnose, and perform corrective maintenance on METRO electronics systems, devices, and equipment.
- Read and interpret blueprints, manuals, schematics, work orders, and specifications.
- Read, understand and apply technical information found in repair manuals, service change bulletins, and applicable technical documents.
- Remain current on new technologies related to the transit industry, surveillance and communications equipment.
- Operate and maintain a variety of hand and power tools, and testing equipment used in installing, repairing, and maintaining electrical systems, equipment, and devices.
- Apply safe work practices and procedures.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent) units from an accredited college with coursework in electronics, electrical technology or a related field.

OR

Two (2) years of progressively responsible experience installing, maintaining and repairing electrical/electronic systems.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Must obtain a valid California Class B driver permit within one (1) month of employment AND must obtain a California Class B driver's license within three (3) months of employment.

SPECIAL REQUIREMENTS:

- Must possess tools necessary to perform the duties of the position and a rollaway toolbox.
- Driving record will be reviewed as part of the application process.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 80 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work out in the field when needed. May require availability to work a flexible schedule.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must be able to respond to emergency situations seven days per week, 24 hours per day.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO's drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance

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Attachment C

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Facilities Maintenance Assistant **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Facilities Maintenance Assistant performs unskilled and semi-skilled tasks maintenance, repair and construction of METRO facilities and properties; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Facilities Maintenance Assistant is the first working-level class in the series. An incumbent in this class performs a limited range of unskilled and semi-skilled facility maintenance work emphasizing routine plumbing, electrical, landscaping, and general facility upkeep. This class is distinguished from the higher-level class of Facilities Maintenance Worker because an incumbent in the latter class performs a wide variety of semi-skilled and skilled facility maintenance work that includes the maintenance and repair of tools and equipment.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs a limited range of unskilled and semi-skilled tasks related to the maintenance and repair of METRO facilities, properties, and related equipment.
- Removes graffiti from bus stops, benches, signs, and surrounding areas.
- Cuts tree branches, shrubs, remove weeds, and blows and picks up debris.
- Collects trash and performs needed sanitation on bus stops, such as wiping down benches and cleaning up spills; responds to biohazard reports.
- Performs minor plumbing repairs such as clearing plugged drains, replacing plumbing appliance parts and repairing sprinkler systems.
- Performs minor electrical repairs such as replacing light tubes and fixtures.
- Performs minor repairs on bus stops and shelters such as replacing roofing, cleaning roofs, cleaning rain gutters, tightening or replacing bolts that anchor shelters to concrete pads, and inserting/removing bus stop poles.
- Paints curbs to designate bus loading zones.
- Maintains work vehicle, tools, equipment, supplies, and work areas in proper and clean condition.
- Drives a dump truck to the County landfill and unloads trash.
- Refuels work vehicles.
- Assists with moving and transporting furniture, equipment, and other heavy objects as needed.
- Assists Facilities Maintenance Workers with projects as assigned.
- Operates a variety of manual and power tools and equipment including hand tools, bench and table tools, and landscaping tools; operates vehicles such as dump trucks, truck mounted cranes and forklifts.
- Performs other duties as assigned.



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EMPLOYMENT STANDARDS:

Knowledge of:

- Basic principles, practices, methods, equipment, materials, and tools used in the maintenance and repair of buildings and facilities.
- Methods and equipment used in groundskeeping operations.
- Occupational hazards of the maintenance trades and appropriate safety equipment and practices.
- Safe work practices.
- The proper operation and maintenance of hand and power tools.
- Methods of maintaining information in digital or hard copy files.
- Time management techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- The effective use of modern office equipment, personal computers and applicable standard business software.

Ability to:

- Follow oral and written instructions.
- Perform routine maintenance, repair, construction and remodeling to facilities, properties, and related equipment.
- Read and interpret blueprints, plans, and technical manuals.
- Use manual and power tools and equipment safely.
- Safely handle hazardous items and materials in accordance with established procedures.
- Make quick decisions in an emergency.
- Maintain records and input data into a database.
- Adhere to established work schedules and timelines.
- Perform duties using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

One (1) year of experience performing building repair and maintenance work.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is often required to reach with hands and arms; walk, stand and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, crawl, kneel, crouch, and climb. Occasional lifting up to 50 pounds unaided may be required. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered during work.

Work Environment:

The employee works in a shop environment where the noise level is usually noisy. The employee may work outdoors in varied weather conditions with potential exposure to fumes, dust, grease, air contaminants, hazardous materials and chemicals. Work requires heavy physical labor and working in confined spaces.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

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 *BOD Approved: 00-00-00
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 *Job Family: Maintenance



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Class Code: Class Code
FLSA Status: Pending

Facilities Maintenance Supervisor **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Facilities Maintenance Supervisor performs supervisory and skilled maintenance work related to the maintenance, repair, and construction of METRO facilities, properties, buildings, and related equipment; supervises and evaluates assigned maintenance staff; coordinates and develops safety and training programs for assigned areas; develops, implements and supervises department record-keeping and information systems; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Facilities Maintenance Supervisor is the supervisory-level class in the series. An incumbent in this class supervises and performs systems maintenance, repair and renovation work for METRO buildings and facilities to ensure they safe and operational. This class is distinguished from the Senior Facilities Maintenance Worker because an incumbent in the latter class serves as a lead worker over subordinate Maintenance Workers and may perform the more difficult skilled maintenance tasks.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Supervises the work of subordinate staff; schedules, assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Instructs and trains employees regarding improved work techniques and safety measures; recommends employees for training; evaluates training options; determines training required by Federal, State, and local laws and regulations; plans, assists and conducts training as appropriate.
- Plans, organizes and schedules the maintenance, repair, and alteration of METRO facilities and equipment; estimates the supplies, equipment and hours needed for projects; ensures that staff has the resources necessary to complete their work.
- Ensures that assigned areas comply with Federal, State, and local laws and regulations.
- Assists in the development of department policies, procedures, work standards, rules and budgets; enforces METRO and department rules, regulations, policies, procedures, and work standards.
- Develops and supervises the maintenance of records including an inventory of supplies needed for facility service and repair; reviews and prioritizes tickets and work orders; solicits and receives quotes from outside vendors to complete jobs.
- Assists in establishing design standards and criteria for projects, including bus stops, facilities, and equipment; reviews project plans for errors and omissions and prepares recommendations; performs cost analyses; administers storage and disposal of surplus fixed assets; monitors building operation costs; collects, records, and utilizes data for project analysis reports.
- Reviews and administers facilities' leases and service contracts; monitors contractor compliance with contracts, specifications and equipment installation.
- Prepares technical studies and reports; obtains and renews required permits related to equipment and building operation.



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- Represents the department at meetings; may serve as liaison to other departments, the public, and outside agencies; reviews, investigates, and responds to complaints regarding mechanical or safety problems.
- Operates field and facility maintenance equipment, tools and vehicles as needed.
- Evaluates transit improvements, including building sites, bus stops, and turnouts.
- Inspects and evaluates work in progress and completed work for compliance with building and safety standards and codes; receive quotes from outside vendors to complete jobs.
- Monitors and records diesel fuel level daily and orders fuel as needed.
- Receives key requests, issues keys and returns keys.
- Offloads CNG fuel from truck to fuel storage tanks.
- Performs data entry to update and maintain information in computerized files; compiles and prepares data for statistical and accounting reports; may create spreadsheets and other tools to track information.
- May type correspondence and other documents; answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Policies, procedures, rules, regulations, and labor contracts that affect employees.
- Applicable Federal, State, and local laws regulatory codes, ordinances and procedures relevant to assigned area of responsibility.
- Principles, practices, methods, equipment, materials, and tools used in the maintenance and repair of METRO buildings and facilities, including carpentry, plumbing, painting, concreting, masonry, HVAC, welding, mechanical and electrical work.
- Uniform Building and Electrical codes.
- Operation and maintenance of internal combustion engines and hydraulic equipment.
- Occupational hazards of the maintenance trades and appropriate safety equipment and practices.
- Methods and equipment used in groundskeeping operations.
- Safe operation and maintenance of hand and power tools.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.



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Ability to:

- Supervise and motivate subordinate staff effectively.
- Provide safety-related and other training to staff and ensure a safe work environment.
- Read and interpret building and mechanical codes, blueprints, plans, and technical manuals.
- Diagnose and troubleshoot equipment problems.
- Estimate costs and determine materials and equipment needed to make building and equipment repairs.
- Develop, write and implement operational procedures.
- Use manual and power tools and equipment safely.
- Make quick decisions in an emergency.
- Ensure the safe handling of hazardous items and materials.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Work independently using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Perform mathematical calculations, including ratios and percentages.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Three (3) years of journey-level experience in facilities maintenance or building trade. At least one (1) year in a lead worker capacity is desirable.

Completion of 30 semester (or equivalent) units in construction technology, business administration, building inspection, energy management or a related field is desirable and may substitute for one year of the required experience.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands



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While performing the duties of this job, the employee is regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop environment where the noise level is usually noisy. The employee may work outdoors in varied weather conditions with potential exposure to fumes, dust, grease, air contaminants, hazardous materials and chemicals. Work requires heavy physical labor and working in confined spaces.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- Required to be able to respond to emergency situations seven days per week, 24 hours per day.

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*BOD Approved: 00-00-00
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*Job Family: Maintenance



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Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Facilities Maintenance Worker **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Facility Maintenance Worker performs semi-skilled and skilled tasks related to the maintenance, repair, and construction of METRO facilities, properties, and related equipment; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Facilities Maintenance Worker is the journey-level class in the series. An incumbent in this class performs a wide variety of semi-skilled and skilled facility maintenance work that includes the maintenance and repair of tools and equipment. This class is distinguished from the lower-level class of Facilities Maintenance Assistant because an incumbent in the latter class performs unskilled and semi-skilled facilities maintenance work that is routine, both in terms of scope and the facilities involved. This class is also distinguished from the higher-level class of Senior Facilities Maintenance Worker because an incumbent in the latter class serves as a lead worker and also performs and coordinates more difficult maintenance and repair projects.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs a wide variety of semi-skilled and skilled tasks related to the maintenance, repair, construction and remodeling of METRO facilities, properties, and related equipment.
- Inspects facilities and related equipment for needed repairs including lighting, electrical, plumbing, roofing, HVAC and mechanical systems; inspects walls, windows, locks, and doors; tests and checks landscaping and irrigation systems.
- Determines materials and time needed to conduct needed maintenance or repairs; requisitions or otherwise requests needed materials and equipment to perform work; meets with vendors or contractors as necessary to review project activities.
- Performs maintenance, repair, construction or remodeling work utilizing carpentry, plumbing, electrical, painting, door/window, locksmith, alarm, roofing, and related trade skills.
- Maintains and repairs washers, lifts, cranes, water and air systems, pumping systems, dispensing systems and other.
- Monitors and maintains secondary storage systems including above-ground waste storage and hazardous materials storage; pumps out waste collection systems; collects stormwater runoff samples for hazardous testing.
- Offloads Compressed Natural Gas (CNG) and diesel fuel from trucks to METRO fueling facilities; monitors fuel station; implements emergency procedures for spill recovery as required.
- Performs landscaping and hardscaping repair and maintenance; installs concrete; paints buildings; repairs benches.
- Operates a variety of manual and power tools and equipment including hand tools, bench and table tools, welding tools and landscaping tools; operates vehicles such as dump trucks, truck mounted cranes and forklifts.
- Prepares time and materials estimates for assigned projects.



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- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, practices, methods, equipment, materials, and tools used in the maintenance and repair of buildings and facilities, including carpentry, plumbing, painting, concreting, masonry, HVAC, welding, mechanical and electrical work.
- Uniform Building and Electrical codes.
- Operation and maintenance of internal combustion engines and hydraulic equipment.
- Occupational hazards of the maintenance trades and appropriate safety equipment and practices.
- Methods and equipment used in groundskeeping operations.
- Safe operation and maintenance of hand and power tools.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Perform a wide variety of maintenance, repair, construction and remodeling to facilities, properties, buildings, and related equipment.
- Read and interpret building and mechanical codes, blueprints, plans, and technical manuals.
- Diagnose and troubleshoot equipment problems.
- Estimate costs and determine materials and equipment needed to make building and equipment repairs.
- Use manual and power tools and equipment safely.
- Make quick decisions in an emergency.
- Ensure the safe handling of hazardous items and materials.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Work independently using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.



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- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Four (4) years of experience equivalent to a Facilities Maintenance Assistant with Santa Cruz METRO.

OR

One (1) year of journey-level experience in one of the following building trades: carpentry, electrical, plumbing, welding or painting. (Note: journey-level status typically requires four (4) years of formal training or apprenticeship).

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is often required to reach with hands and arms; walk, stand and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, crawl, kneel, crouch, and climb. Occasional lifting up to 50 pounds unaided may be required. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered during work.

Work Environment:

The employee works in a shop environment where the noise level is usually noisy. The employee may work outdoors in varied weather conditions with potential exposure to fumes, dust, grease, air contaminants, hazardous materials and chemicals. Work requires heavy physical labor and working in confined spaces.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.



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- Required to be able to respond to emergency situations seven days per week, 24 hours per day.

*Adopted: 00-00-00
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*Job Family: Maintenance

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Financial Analyst I

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Financial Analyst I performs a limited range of professional analytical duties related to centralized METRO budgetary and other financial functions, processes and projects; participates in the annual organization-wide budget process and prepares budget documents; researches, analyzes and forecasts trends related to budget, project, financial and accounting issues; participates in strategic planning activities related to projected revenues and expenditures; performs periodic and ongoing operational financial analysis and reporting; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Financial Analyst I is the first working-level class in the series. An incumbent in this class performs a limited range of professional financial analytical duties while learning to perform the full scope of work. This class may be distinguished from the higher-level class of Financial Analyst II because an incumbent in the latter class performs the full-scope of journey-level financial analytical work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs a limited range of journey-level professional analyst duties to support centralized METRO budgetary and other financial functions, processes and projects, while learning to perform the full scope of journey-level financial analyst work.
- Participates in the annual organization-wide budget process; gathers information from various internal and external data sources; analyzes past trends; coordinates with department directors and budget support personnel to prepare departmental non-personnel budgets; develops the labor and fringe benefit budget projections; develops and prepares budget documents as assigned.
- Forecasts expenditures in accordance with current labor contracts, laws and economic conditions; develops budget revenue projections using statistical models, historical revenue and ridership data, as well as current economic indicators.
- Participates in the development of METRO's five and ten-year Strategic Plan; researches, analyzes and summarizes information for management consideration and planning; provides financial recommendations and forecasts.
- Writes monthly budget status reports; prepares presentations to inform the Board of Directors and the public regarding METRO's actual revenues and expenses in relation to the adopted operating and capital budgets.
- Assists in administering METRO's timekeeping software by providing and editing user access and security permissions, creating new pay policies and pay codes, auditing system outputs and coordinating with Information Technology staff to identify business needs and resolve technical problems.
- Calculates pay rates and maintains records of wage tables for all bargaining units and management classes for purposes of labor negotiations, wage surveys and classification and



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compensation studies; advises management on the operating cost impacts of potential labor contracts and service enhancement; prepares multi-year scenarios and forecasts.

- Prepares invoices and trust warrants for union-related payments and charges.
- Participates in the preparation of the annual budget book and automated budget tracking templates; uploads budget files for purchasing and accounting software.
- Coordinates and performs special projects.
- Develops and maintains a wide variety of financial records, reports, reporting tools and other documents; prepares correspondence; makes presentations to individuals and groups.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to attend meetings, conferences or trainings.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, practices, forms and techniques of professional public sector finance, budgeting and accounting.
- Principles and best practices of public agency budgeting, including revenue forecasting and investing.
- Principles and practices of operational and financial research and analysis.
- Public sector best practices regarding record-keeping and reporting.
- Laws and regulations applicable to public sector finance, taxes, payroll reporting and transit agencies.
- Financial and statistical reporting and analysis.
- Business law principles and practices.
- Public sector accounting terminology and methods.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Project management methods.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software, including specialized financial applications.

Ability to:

- Plan, organize, coordinate, prepare and control budgets.
- Perform a wide variety of complex, professional financial analysis tasks and studies in compliance with applicable laws, regulations and policies.
- Evaluate, interpret and apply laws, regulations, policies, procedures and requirements pertaining to organizational financial activities.



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- Analyze complex financial, statistical, accounting and payroll information and formulate sound conclusions and recommendations.
- Assess economic conditions and determine economic assumptions for financial forecasts.
- Maintain complex financial and statistical data and records.
- Consult with and advise management on a wide variety of financial issues.
- Utilize financial and budgeting software, including spreadsheet, database, finance and payroll applications, at an advanced level.
- Apply professional fiscal control procedures to maintain budgetary accounts.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in finance, accounting, economics, business administration or a related field.

AND

Two (2) years of professional financial analytical experience, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must maintain strictest confidentiality of information.
- Must participate in professional development activities.
- May require occasional travel.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may



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require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Financial Professional

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Financial Analyst II

Bargaining Unit: SEA

DEFINITION:

Under direction, a Financial Analyst II performs professional analytical duties related to centralized METRO budgetary and other financial functions, processes and projects; plans and coordinates the annual organization-wide budget process and prepares budget documents; researches, analyzes and forecasts trends related to budget, project, financial and accounting issues; participates in strategic planning activities related to projected revenues and expenditures; performs periodic and ongoing operational financial analysis and reporting; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Financial Analyst II is the journey-level class in the series. An incumbent in this class performs the full-range of journey-level, professional analytical work to coordinate METRO budgetary functions and provide accurate and timely financial reports to management, other governmental agencies and the public. This class may be distinguished from the lower-level class of Financial Analyst I because an incumbent in the latter class performs a limited range of duties while learning to perform the full scope of journey-level work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Plans and coordinates the annual organization-wide budget process; gathers information from various internal and external data sources; analyzes past trends; coordinates with department directors and budget support personnel to prepare departmental non-personnel budgets; develops the labor and fringe benefit budget projections; develops and prepares budget documents as assigned.
- Forecasts expenditures in accordance with current labor contracts, laws and economic conditions; develops budget revenue projections using statistical models, historical revenue and ridership data, as well as current economic indicators.
- Participates in the development of METRO's five and ten-year Strategic Plan; researches, analyzes and summarizes information for management consideration and planning; provides financial recommendations and forecasts.
- Writes monthly budget status reports; prepares presentations to inform the Board of Directors and the public regarding METRO's actual revenues and expenses in relation to the adopted operating and capital budgets.
- Assists in administering METRO's timekeeping software by providing and editing user access and security permissions, creating new pay policies and pay codes, auditing system outputs and coordinating with Information Technology staff to identify business needs and resolve technical problems.
- Calculates pay rates and maintains records of wage tables for all bargaining unit and management classes for purposes of labor negotiations, wage surveys and classification and compensation studies; advises management on the operating cost impacts of potential labor contracts and service enhancement; prepares multi-year scenarios and forecasts.



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- Prepares invoices and trust warrants for union-related payments and charges.
- Prepares the annual budget book and automated budget tracking templates; uploads budget files for purchasing and accounting software.
- Coordinates and performs special projects.
- Develops and maintains a wide variety of financial records, reports, reporting tools and other documents; prepares correspondence; makes presentations to individuals and groups.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to attend meetings, conferences or trainings.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced principles, practices, forms and techniques of professional public sector finance, budgeting and accounting.
- Advanced principles and best practices of public agency budgeting, including revenue forecasting and investing.
- Principles and practices of operational and financial research and analysis.
- Public sector best practices regarding record-keeping and reporting.
- Laws and regulations applicable to public sector finance, taxes, payroll reporting and transit agencies.
- Financial and statistical reporting and analysis.
- Business law principles and practices.
- Advanced public sector accounting terminology and methods.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Advanced methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Project management methods.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software, including specialized financial applications.

Ability to:

- Plan, organize, coordinate, prepare and control budgets.
- Coordinate and perform a wide variety of complex, professional financial analysis tasks and studies in compliance with applicable laws, regulations and policies.
- Evaluate, interpret and apply laws, regulations, policies, procedures and requirements pertaining to organizational financial activities.
- Analyze complex financial, statistical, accounting and payroll information and formulate sound conclusions and recommendations.



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- Assess economic conditions and determine economic assumptions for financial forecasts.
- Maintain complex financial and statistical data and records.
- Consult with and advise management on a wide variety of financial issues.
- Utilize financial and budgeting software, including spreadsheet, database, finance and payroll applications, at an advanced level.
- Apply advanced professional fiscal control procedures to maintain budgetary accounts.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in finance, accounting, economics, business administration or a related field.

AND

Five (5) years of professional financial analytical experience, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Must maintain strictest confidentiality of information.
- Must participate in professional development activities.
- May require occasional travel.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may



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require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Financial Professional

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Fleet Maintenance Supervisor

Bargaining Unit: PSA

DEFINITION:

Under direction, a Fleet Maintenance Supervisor performs supervisory and skilled maintenance work related to the repair, alteration, and servicing of METRO vehicles and related equipment; supervises and evaluates assigned maintenance staff; coordinates and develops safety and training programs for assigned areas; develops, implements and supervises department record-keeping and information systems; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Fleet Maintenance Supervisor is a supervisory-level class. An incumbent in this class supervises and performs fleet maintenance, repair and renovation work for METRO vehicles to ensure the safe, clean and operational.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Supervises the work of subordinate staff; schedules, assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Instructs and trains employees regarding improved work techniques and safety measures; recommends employees for training; evaluates training options; determines training required by Federal, State, and local laws and regulations; plans, assists and conducts training as appropriate.
- Plans, organizes and schedules the maintenance, repair, and alteration of METRO vehicles and related equipment; reviews, prioritizes and assigns work orders; estimates the supplies, equipment and hours needed for projects; ensures that staff has the resources needed to complete their work.
- Ensures that assigned areas comply with Federal, State, and local laws and regulations.
- Assists in the development of department policies, procedures, work standards, rules, and budgets; enforces METRO and department rules, regulations, policies, procedures, and work standards.
- Develops and implements record-keeping systems for vehicle maintenance, repairs, inspections, road calls, service, fuel consumption, and parts and labor costs; prepares periodic reports on maintenance activities and projects; monitors maintenance standards and performance in areas of oil/fuel analysis, road calls, labor costs, bus cleanliness, vehicle inspections, and shop safety; reviews repair work estimates.
- Develops, implements, and maintains a preventive maintenance program for transit vehicles; monitors vehicle failure trends and suggests corrective actions as needed.
- Solicits and receives quotes from outside vendors as needed to complete jobs.
- Monitors budgets as assigned; assists in departmental planning by projecting expenditures and determining staffing needs.



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- Participates in the diagnosis of the more complex mechanical failures and recommends solutions; assists in developing specifications for the purchase of equipment, vehicles, and tools.
- Represents the department at meetings; may serve as liaison to other departments, the public, and outside agencies; reviews, investigates, and responds to complaints regarding fleet mechanical or safety problems.
- Investigates vehicle accidents, prepares damage reports and reviews accident reports; determines mechanical problems and recommends corrective action; prepares employee injury reports.
- Ensures that proper safety practices and procedures are followed including the proper use of personal protective equipment (PPE).
- Performs data entry to update and maintain information in digital files; compiles and prepares data for statistical and accounting reports; may create spreadsheets and other tools to track information.
- May type correspondence and other documents; answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Policies, procedures, rules, regulations, and labor contracts that affect employees.
- Techniques, procedures, equipment, tools, and materials used for the maintenance, repair, and service of transit vehicles, including buses.
- Preventive vehicle maintenance practices and methods.
- Mechanical, electrical, air, and hydraulic systems of transit buses and vehicles.
- Applicable Federal and State codes and regulations regarding buses, vehicles, and equipment, including employee safety requirements.
- Proper handling procedures for hazardous materials, health and safety regulations, safe work practices and proper equipment operating procedures.
- Safe operation and maintenance of hand and power tools.
- Methods of maintaining information in digital or hard copy files.
- Manual and automated record-keeping systems.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:



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- Supervise and motivate subordinate staff effectively.
- Provide safety-related and other training to staff and ensure a safe work environment.
- Read and interpret mechanical schematics and technical manuals.
- Diagnose and troubleshoot equipment problems.
- Learn and instruct others in the safe operation of the Alternative Fueling Facility.
- Estimate costs and determines materials and equipment needed to make vehicle repairs.
- Develop, write and implement operational procedures.
- Use manual and power tools and equipment safely.
- Make quick decisions in an emergency.
- Ensure the safe handling of hazardous items and materials.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Work independently using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Perform mathematical calculations, including ratios and percentages.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Five (5) years of progressively responsible experience in heavy-duty diesel and/or alternate fuel mechanic repair work and rebuilding diesel engines and related components. Experience must have also included at least three (3) years of supervisory or lead experience.

College-level coursework in business, transit management, hazardous materials technology, industrial technology, and/or behavioral science is desirable.

LICENSES AND CERTIFICATES:

A valid California Class B driver license with passenger endorsement and safe driving record are required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Driving record will be reviewed as part of the application process.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.



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Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 75 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually loud. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Required to be able to respond to emergency situations seven days per week, 24 hours per day.
- Required to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO’s drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 00-00-00
 *BOD Approved: 00-00-00
 *Revised: 00-00-00
 *Job Family: Maintenance



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Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Grants/Legislative Analyst **Bargaining Unit: SEA**

DEFINITION:

Under direction, a Grants/Legislative Analyst performs professional administrative work related to developing, preparing, and monitoring Federal, State and local grant applications and programs; ensures contract compliance related to grant projects; provides financial controls of grant-funded activities; performs legislative analysis and advocates legislative action; performs data analysis and comprehensive studies of policy issues; performs planning and programming activities; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Grants/Legislative Analyst is a journey-level professional analyst class. An incumbent in this class performs tasks requiring in-depth knowledge and interpretation of grant administration and legislative policy, laws, regulations and policies as well as the application of complex analytical thinking and methodologies to investigate and resolve difficult issues.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Administers policies and procedures in accordance with State, Federal, and organizational guidelines.
- Identifies and researches potential funding sources and strategies for METRO projects and programs.
- Administers grants from application to approval and subsequent reporting to the funding agency; prepares grant amendments, funding allocation requests, budget revisions, and requests for grant extensions; informs department managers and staff of regulations, requirements, procedures, and guidelines of programs to ensure compliance.
- Develops grant oversight plans, objectives, and strategies; determines appropriate implementation and monitors progress.
- Develops and maintains best practices related to the fiscal management of grants.
- Prepares project descriptions, justifications and other reports or documents to satisfy grant requirements; meets with and acts as a liaison to staff and officials at the Federal, State, and local levels to expedite the review and approval of grants; coordinates public hearing processes for grant programs.
- Develops and prepares grant applications and claims for agencies that are sub-recipients of grant funds from METRO; trains staff of sub-recipients regarding grant procedures and requirements; reviews submittals from sub-recipients and determines compliance with grant requirements.
- Assists in planning, developing, preparing and implementing capital project outlines, timetables, descriptions, and budgets; provides financial forecasts for grant programs; performs research, collects data, and prepares reports for planning, administrative, and financial purposes.
- Prepares transit planning and forecasting documents and assists in the preparation of the Short-Range Transit Plan.



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- Provides grant-specific training and support to the department.
- Researches, monitors, and reviews legislation, laws, rules, and regulations to ensure METRO compliance and recommend appropriate action.
- Oversees and coordinates the department's legislative agenda and works with management for input and needs.
- Represents METRO in legislative and intergovernmental activities with Federal, State, and local agencies; reviews, analyzes, and prepares bill summaries and makes recommendations on legislative proposals and bills; interprets policy and makes recommendations for compliance; contacts legislative representatives to ensure METRO's interests are represented.
- Develops and maintains a tracking system for monitoring approved and adopted legislation, policies and procedures.
- Analyzes and evaluates policy issues to identify and assess the impact of policy options and legislation on department programs and services.
- Maintains and provides clear, concise and accurate written reviews of pending, proposed and current legislation potentially affecting department operations.
- Identifies issues, trends, and problems of significance through legislative, governmental, cultural, and media analysis.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Laws and regulations applicable to grant administration and Federal, State, and local funding practices and procedures.
- Federal, State, and local legislative processes.
- Principles and practices of public administration, budgeting, accounting, financial planning and analysis, operations research and evaluation.
- The legislative process.
- Analytical methods of researching, gathering, organizing and reporting data, including basic statistical analysis.
- Modern office practices, procedures and equipment, including automated information systems.
- Business correspondence, formatting and report writing.
- Methods of prioritizing, planning and organizing complex projects and analytical work.
- Advanced time management techniques.
- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:



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- Analyze, interpret, explain, implement and enforce relevant policies, regulations and requirements.
- Define complex problems and develop solutions using analytical techniques.
- Understand implications of new information for current and future problem-solving and decision-making.
- Use logic and reasoning to identify strengths and weaknesses of proposals, alternatives, and conclusions, and to determine policy compliance of proposals.
- Identify issues for legal review.
- Plan, organize and/or prepare research and analytical studies including complex, multi-phased projects and programs.
- Research, collect, analyze and interpret data and prepare comprehensive reports of findings and recommendations.
- Establish and maintain complex records and systems requiring confidentiality and security.
- Provide effective and responsive customer service, including in stressful situations.
- Negotiate solutions to difficult issues.
- Work independently using good judgment, tact and discretion.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in planning, political science, economics, public administration, or a related field.

AND

Four (4) years of professional experience in a transportation agency that included grant writing, planning, governmental relations, legislative affairs, research and analysis.

Master's degree is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must participate in professional development activities.
- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Professional



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Human Resources Analyst

Bargaining Unit: SEA

DEFINITION:

Under direction, a Human Resources Analyst performs professional analytical duties related to Human Resources (HR) Department functions and processes, including recruitment, selection, classification, compensation, employee development, employee relations, regulatory compliance and Human Resource Information System (HRIS) development/administration; assists HR management in planning, organizing and achieving departmental objectives; provides professional advice and assistance to METRO management on personnel-related issues; may supervise subordinate clerical and/or technical support staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Human Resources Analyst is a journey-level professional analyst class. An incumbent in this class performs tasks that require in-depth knowledge and interpretation of personnel-related laws, regulations and policies as well as the application of complex analytical thinking and methodologies to investigate and resolve difficult issues.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs professional analytical duties to support HR functions and processes including recruitment, selection, classification, compensation, employee development, employee relations, regulatory compliance, records management and Human Resource Information System (HRIS) development and administration; assists the Human Resources Director and Human Resources Deputy Director in planning, organizing and achieving departmental objectives; provides professional advice and assistance to METRO management on personnel-related issues.
- Coordinates with Information Technology (IT), Finance and Payroll staff to ensure that HRIS data is appropriately maintained and updated; ensures that position control and payroll data is correct and integrating properly with other systems; assists IT staff in testing and implementing HRIS upgrades and patches; prepares and develops HRIS reports and reporting tools; defines pre-defined queries; performs HRIS audits, wage audits, recruitment audits and system interface audits; identifies and resolves deficiencies; works with IT staff as needed.
- Serves as the Human Resources business process expert to communicate end-user requirements to the HRIS vendor as well as IT staff; assesses available options and recommends system customizations and new applications; trains HR staff and HRIS end-users by developing training materials and providing instruction on how to perform duties more efficiently using HRIS.
- Prepares and administers the HR budget by opening purchase orders, processing payments, tracking expenditures and recommending adjustments/transfers; prepares technical procurement documents such as requests for proposals, bids and training material.
- Assists in planning, administering and implementing METRO's Equal Employment Opportunity Plan, including data collection, analysis and reporting.



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- Oversees day-to-day HR operational activities; evaluates operational effectiveness and efficiency and recommends changes as needed; ensures compliance with industry standards and legal requirements; develops, revises and analyzes HR policies and procedures.
- Administers step increase and longevity pay plans to ensure compliance with collective bargaining agreements; reviews personnel action documents and routes for approval; processes compensation changes into HRIS by updating reference tables and ensuring compliance with negotiated agreements.
- Develops and conducts recruitment and related outreach activities including strategic planning, advertising analysis and placement, and examination development and administration; resolves various complex inquiries and issues; screens employment applications, develops and administers examinations, and certifies eligibility lists; responds to inquiries regarding recruitment status.
- Assists with conducting job analyses, evaluations and classification studies; writes classification specifications and conducts salary surveys; compiles and analyzes compensation data.
- Works with supervisory and management staff to review medical conditions for possible accommodation; assists in conducting the interactive process, implementing reasonable accommodations, and monitoring the effectiveness of accommodations.
- May perform labor relations activities such as investigating employee grievances, discrimination complaints and possible policy violations.
- May assist with benefits-related administrative and analytical activities and serve as a back up to the Benefits Administrator.
- Performs analytical research and prepares reports findings and recommendations; composes a variety of complex narrative and statistical documents including procedures, procedure manuals, and other technical documents.
- May supervise subordinate technical, clerical and/or other support staff by scheduling, assigning, directing and evaluating their work; provides staff training as needed; may perform and/or have significant input into staff selection and disciplinary action.
- Oversees the organization and maintenance of confidential HR materials, records, files and other privileged information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to attend meetings, conferences, or perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of public administration including planning, organizational development, systems administration, finance, purchasing and staff development.
- Principles and practices of public human resources management including merit-based recruitment and staff selection, training, equal employment opportunity, benefits administration, classification, job analysis, safety and risk management.
- Laws and regulations applicable to public human resources management.
- Principles of pay equity and compensation management.
- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Analytical methods of researching, gathering, organizing and reporting data.
- Modern office practices, procedures and equipment, including automated human resources information systems.



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- Business correspondence, formatting and report writing.
- Methods of prioritizing, planning and organizing complex projects and analytical work.
- Advanced time management techniques.
- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Analyze, interpret, explain, implement and enforce human resources policies, regulations and requirements.
- Define complex problems and develop solutions using analytical techniques.
- Plan, organize and/or prepare research and analytical studies including complex, multi-phased projects and programs.
- Research, collect, analyze and interpret data and prepare comprehensive reports of findings and recommendations.
- Establish and maintain complex records and systems requiring confidentiality and security.
- Provide effective and responsive customer service, including in stressful situations.
- Negotiate solutions to difficult issues.
- Work independently using good judgment and discretion.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major study in business, public administration or a related field.

AND

Two (2) years of professional human resources analytical experience, preferably in a public agency.

Familiarity with transit agency or transportation system activities and functions is desirable.

Experience administering a Human Resources Information System is desirable.

Master's degree is desirable.



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LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Certified Professional (CP) or Senior Certified Professional (SCP) from a recognized Human Resource Certification organization such as IPMA-HR, SHRM, or HRCI is desirable.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.
- Must maintain strict confidentiality of work-related information.
- Must participate in professional development activities.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Professional



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Human Resources Clerk

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Human Resources Clerk performs clerical duties to support Human Resources (HR) Department functions and processes; assists higher-level staff with administrative tasks related to recruitment, benefits, workers' compensation or other human resources functions; maintains detailed records of computerized and hard copy files; gathers and compiles data for statistical or financial reports; provides information to employees and the public as authorized; types, files and performs general office work; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Human Resources Clerk is a journey-level clerical class. An incumbent in this class performs clerical human resources support tasks of average difficulty that require some knowledge and application of HR policies, practices and procedures. This class may be distinguished from the higher-level class of Human Resources Specialist because an incumbent in the latter class performs advanced-level clerical duties related to workers' compensation administration and/or other specialized HR functions.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs data entry to update and maintain the computerized METRO Human Resources Information System (HRIS); maintains information related to personnel actions such as change of status, hours worked, performance reviews, step advancements, and other human resources activities.
- Prepares employee identification cards; distributes bus passes and annual bus stickers; maintains related records and files.
- Receives and processes routine financial documents, including invoices and bills; prepares payment authorizations, requisitions, and check requests; maintains and orders supplies.
- Compiles and prepares data for statistical reports, including EEO and salary surveys.
- Schedules and coordinates interviews; prepares interview packets.
- Maintains and updates mailing lists.
- Composes and/or types various department memos, letters, reports, statistical data, and correspondence as directed.
- Performs telephone employment verifications.
- Maintains and updates personnel and/or benefit files by inserting and extracting information; handles confidential materials, records, files and other privileged information.
- Answers telephones, greets visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- May coordinate employee medical exams and assist with employee orientations.
- May verify applicant identity and employment eligibility by gathering and reviewing documentation.



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- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Modern office practices, procedures and equipment.
- Basic clerical processes pertaining to accounting, purchasing and data maintenance.
- Basic methods of maintaining information in computerized or hard copy files.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Maintain confidentiality of materials, records, files and other privileged information using tact and discretion.
- Maintain detailed records and control systems with accuracy and attention to detail.
- Input data into a computerized database.
- Type finished copy from rough draft or machine transcription.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Type at a corrected rate of 50 words per minute from clear copy.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Three (3) years of progressively responsible clerical experience requiring the operation of personal computers, database systems, typing and maintaining detailed recordkeeping systems.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects and. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Clerical



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Human Resources Specialist

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Human Resources Specialist performs advanced clerical duties to support one or more specialized Human Resources (HR) Department functions and processes; reviews and processes workers' compensation claims and reports and assists with the administration of the workers' compensation program; serves as a liaison to insurance carriers, claims representatives, contractors and others; assists higher-level staff with administrative tasks involving recruitment, benefits, or other HR functions; may serve as a lead worker over subordinate support staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Human Resources Specialist is an advanced-level clerical class. An incumbent in this class performs clerical human resources support tasks of above-average difficulty that require substantial knowledge and application of specialized human resources policies, practices and procedures. This class may be distinguished from the lower-level class of Human Resources Clerk because an incumbent in the latter class performs journey-level clerical duties. It can also be distinguished from the higher-level class of Human Resources Technician because an incumbent in the latter class performs journey-level human resources technical duties.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Reviews and processes workers' compensation claim forms and related documents; may train METRO employees on proper completion of injury reports and related documents.
- Assists in monitoring workers' compensation cases from inception to final disposition; prepares and maintains workers' compensation logs, posters, reports, notices and related records and materials; assists management in maintaining regulatory compliance in the workers' compensation program.
- Acts as liaison with other METRO departments, the workers' compensation claims administrator, insurance carriers, contractors and others; assists in preparing proposals, bid specifications and other technical documents.
- Assists in the development and maintenance of automated databases for workers' compensation claims; runs queries to compile data and prepares requested reports.
- Assists in the preparation of the workers' compensation budget and/or other departmental budgets; monitors claim payments and other administrative expenses; audits, reviews, corrects and prepares statements from workers' compensation contractors and providers.
- Provides information to supervisors and employees regarding workers' compensation; monitors employee absences for potential impact on benefits.
- Performs data entry to update and maintain the computerized METRO Human Resources Information System (HRIS); maintains information related to personnel actions such as change of status, hours worked, performance reviews, step advancements, and other HR activities.



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- Assists in conducting recruitment and testing activities; responds to inquiries regarding job openings and recruitment status; assists in maintaining employee benefit records as needed.
- May serve as a lead worker over subordinate clerical or other support staff by prioritizing, assigning and monitoring their work and providing training as needed.
- Maintains confidential materials, records, files and other privileged information.
- Monitors departmental expenditures; prepares payment authorizations.
- Initiates, composes and/or types various department memos, letters, reports, statistical data, and other narrative documents; writes, updates and maintains department procedure manuals.
- Answers telephones, greets visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Modern office practices, procedures and equipment.
- General laws, regulations, procedures and practices pertaining to workers' compensation claims processing as well as other specialized human resources activities.
- Clerical processes pertaining to accounting, purchasing and data maintenance.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in computerized or hard copy files.
- Clerical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Interpret, explain and apply human resources policies, procedures and regulations.
- Maintain confidentiality of materials, records, files and other privileged information using tact and discretion.
- Gather, record and summarize data in a variety of formats.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a computerized database.
- Type finished copy from rough draft or machine transcription.
- Lead and motivate subordinate staff.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Type at a corrected rate of 50 words per minute from clear copy.
- Work independently using good judgment, tact and discretion.



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- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Four (4) years of progressively responsible clerical experience requiring the operation of personal computers, database systems, typing and maintaining detailed recordkeeping systems. Experience must also have included at least two (2) years in a centralized human resources organization.

Experience reviewing and processing workers' compensation claims is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects and. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally require working extended hours or hours outside of regular schedule.



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Santa Cruz METRO

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Clerical

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Human Resources Technician

Bargaining Unit: SEA

DEFINITION:

Under direction, a Human Resources Technician performs technical administrative duties to support Human Resources (HR) Department functions and processes; coordinates, organizes and conducts technical recruitment activities; coordinates onboarding processes for new employees; schedules and conducts new employee orientations; maintains confidential employee records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Human Resources Technician is the journey-level class in the series. An incumbent in this class performs tasks that require interpretation and application of specialized HR policies to ensure that assigned activities comply with various legal, regulatory, policy and other requirements. This class may be distinguished from the lower-level class of Human Resources Specialist because an incumbent in the latter class performs advanced clerical duties. It can also be distinguished from the higher-level class of Human Resources Analyst because an incumbent in the latter class performs journey-level professional human resources work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Coordinates, organizes and conducts technical recruitment activities following established procedures.
- Processes position requisitions; assembles job fliers; drafts advertisements and promotional materials; coordinates the production and distribution of job announcements and the placement of job posting advertisements.
- Receives and screens applications for minimum qualifications; prepares and organizes applications for management review; coordinates testing processes by scheduling proctors and arranging interview panels; tabulates applicant scores and prepares eligibility lists.
- Assists hiring departments by arranging selection interviews and communicating with applicants; as authorized, sends offers of employment and schedules pre-employment drug screening, fingerprinting and medical examinations; coordinates new employee onboarding processes.
- Schedules new employee orientation and prepares hiring packets; conducts orientation presentations as assigned.
- Coordinates recruitment and hiring of temporary help through outside employment agencies.
- Assists with benefits administration by reviewing payroll reports for errors; verifies that proper health and life insurance deductions have been taken; notifies employees of errors and monies owed; creates payroll deduction forms for payroll; collects checks and provides to Finance.
- May perform technical duties related to other HR activities such as workers' compensation, benefits, and leave administration; may assist with classification and compensation studies and surveys; may respond to employment verification inquiries.
- Updates and maintains information in the computerized METRO Human Resources Information System (HRIS); may assist in processing personnel actions to adjust job status, hours worked,



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performance reviews, step advancements, and other changes; conducts HRIS queries and prepares regular and periodic reports for management as requested; maintains various logs and lists.

- Performs technical research and prepares summaries of findings; initiates, composes and/or types various department memos, letters, reports, statistical data, and other narrative documents; writes, updates and maintains department procedures and procedure manuals.
- Coordinates and/or participates in job fairs and other recruitment outreach activities.
- Maintains confidential materials, records, files and other privileged information.
- May monitor departmental expenditures; may prepare payment authorizations.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Technical principles, practices and procedures common to public employment, including recruitment, testing and selection.
- Basic laws and regulations applicable to public personnel management, including equal employment opportunity and merit-based selection.
- Modern office practices, procedures and equipment, including automated human resources information systems.
- Technical processes pertaining to accounting, purchasing, and data maintenance.
- Business correspondence, formatting and report writing.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Advanced telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Evaluate, interpret and apply human resources policies, regulations and requirements as they apply to technical employment-related activities.
- Coordinate and perform technical human resources activities in a manner that complies with applicable laws, regulations and policies.
- Work independently using good judgment, tact and discretion.
- Review and screen documents for minimum qualifications or other requirements.
- Maintain confidentiality of materials, records, files and other privileged information using tact and discretion.



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- Interpret, explain and apply human resources policies, procedures and regulations.
- Gather, record and summarize data in a variety of formats.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent quarter) units at an accredited college with coursework in human resources management, industrial relations, public administration, business administration, or a related field.

AND

Two (2) years of progressively responsible clerical experience in a centralized human resources organization.

Experience in a public agency is desirable.

Experience performing employee recruitment activities is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects and. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands



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While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Technical

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Information Technology Technician I

Bargaining Unit: SEA

DEFINITION:

Under general supervision, an Information Technology Technician performs a limited range of technical computer support work while learning to perform the full scope of journey-level work; performs system backups; resolves user's technical support questions; receives, tests and installs networked and personal computers and related equipment; performs maintenance, troubleshooting and repair on computer hardware and routine user issues; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Information Technology Technician I is the first working-level class in the series. An incumbent in this class performs a limited range of hardware and software maintenance and user support tasks. This class is distinguished from the higher-level class of Information Technology Technician II because an incumbent in the latter class performs the full-range of journey-level work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Provides routine user support utilizing an established tracking system for help desk requests; responds to inquiries through the tracking system and over the phone; monitors and tracks problems and their resolution; identifies patterns of failure and applies knowledge of computer software and hardware procedures to implement solutions and diagnostic procedures.
- Performs routine system backup operations; performs the more routine installation, repair, and maintenance work on computers, printers, network hardware, switches, routers, and cabling; troubleshoots routine hardware problems and replaces failed components; installs technology systems and equipment in a proper and safe manner.
- Assists in developing and writing user procedure manuals; teaches basic system operational procedures such as login and e-mail access; assists in configuring basic user environments to meet individual needs.
- Assists with inventory control of computer parts.
- Participates in assembling and testing new systems; assists with unloading, asset tagging, documenting and installing new computer equipment and removing, storing, and disposing of obsolete computer equipment.
- Assists with installing new application software as well as system hardware and software upgrades.
- Learns to perform user-level administration of Windows Active Directory (AD) and Exchange.
- Assists in monitoring Windows servers, NIX operational systems and networks; performs routine configuration maintenance; troubleshoots routine operation and configuration issues and tests system stability; performs reset, recovery and backup procedures.
- Assists third party vendors with installations, upgrades, and application maintenance; helps with application troubleshooting, diagnostics, communication, and resolution.
- Assists with maintaining, monitoring and supporting transit ticketing systems including hardware, installations, upgrades, equipment, and applications.



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- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Workplace safety issues related to the use of computers.
- Basic Microsoft Windows and NT.
- Basic NIX commands, scripting language, and protocols.
- Basic networking protocols (TCP/IP, DNS routing, switching, subnets, firewalls).
- Basic Microsoft Office application software including Word and Excel.
- Basic UNIX OS.
- Basic hardware technology.
- Basic remote access technologies.
- Basic anti-virus technologies.
- Basic security protocols.

Ability to:

- Clearly and effectively present technical information to both technical and non-technical users.
- Read and interpret technical manuals, procedures, and instructions.
- Troubleshoot and diagnose system and application problems in order to maintain system operation.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent) units from an accredited college with coursework in computer science.

AND

Two (2) years of technical computer support experience. Experience providing customer support using a help desk ticket tracking system is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Information Technology Technical



Attachment C

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Information Technology Technician II

Bargaining Unit: SEA

DEFINITION:

Under general supervision, an Information Technology Technician performs journey-level technical computer support work; performs system backups; resolves user's technical support questions; receives, tests and installs networked and personal computers and related equipment; performs maintenance, troubleshooting, and repair on computer hardware and routine user issues; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Information Technology Technician II is the journey-level class in the series. An incumbent in this class provides user technical support as well as hardware and software maintenance of a routine nature. This class is distinguished from the lower-level class of Information Technology Technician I because an incumbent in the latter class performs a limited range of technical support duties while learning to perform the full-range of journey-level work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Provides user support utilizing an established tracking system for help desk requests; responds to inquiries through the tracking system and over the phone; monitors and tracks problems and their resolution; identifies patterns of failure and applies knowledge of computer software and hardware procedures to implement solutions and diagnostic procedures.
- Installs, repairs, and maintains computers, printers, network hardware, switches, routers, and cabling; troubleshoots routine hardware problems and replaces failed components; installs technology systems and equipment in a proper and safe manner.
- Assists in developing and writing user procedure manuals; teaches basic system operational procedures such as login and e-mail access; assists in configuring basic user environments to meet individual needs.
- Coordinates inventory control of computer parts; maintains supplies inventory.
- Participates in the assembly and testing of new systems; coordinates the unloading, asset tagging, documentation and installation of new computer equipment and the removal, storage, and disposition of obsolete computer equipment.
- Installs new application software as well as system hardware and software upgrades.
- Performs user-level administration of Windows Active Directory (AD) and Exchange; creates, maintains, monitors and troubleshoots user accounts, logins, email, and security; sets access security.
- Assists in building and monitoring Windows servers, NIX operational systems, and networks; performs routine configuration maintenance; troubleshoots routine operation and configuration issues and tests system stability; performs reset, recovery and backup procedures.
- Assists third party vendors with installations, upgrades, and application maintenance; helps with application troubleshooting, diagnostics, communication, and resolution.



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- Maintains, monitors and supports transit ticketing systems including hardware, installations, upgrades, equipment, and applications.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Microsoft Windows and NT.
- NIX commands, scripting language, and protocols.
- Networking protocols (TCP/IP, DNS routing, switching, subnets, firewalls).
- Microsoft Office application software including Word and Excel.
- UNIX OS
- Current hardware technology.
- Workplace safety issues related to the use of computers.
- Remote access technologies.
- Anti-virus technologies.
- Security protocols.

Ability to:

- Clearly and effectively present technical information to both technical and non-technical users.
- Read and interpret technical manuals, procedures, and instructions.
- Troubleshoot and diagnose system and application problems in order to maintain system operation.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent) units from an accredited college with coursework in computer science.

AND

Three (3) years of technical computer support experience. Experience must have included at least one (1) year providing customer support using a help desk ticket tracking system.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the



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Santa Cruz METRO

time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Information Technology Technical



Attachment C

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Legal Secretary

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Legal Secretary performs specialized clerical and secretarial work in the Office of the General Counsel; prepares and processes legal documents, obtains or provides and confidential information; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Legal Secretary is a journey-level class. An incumbent in this class performs the full range of complex legal secretarial support work. The emphasis of the work may vary, depending upon assignment, but all work requires knowledge of legal clerical processes and independent decision-making within established guidelines.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Transcribes complex legal dictation or written notes using a computer; types a wide variety of legal documents in the proper format including legal pleadings, briefs, correspondence, subpoenas, motions, ordinances, resolutions, petitions, and contracts.
- Abstracts information from various sources and puts into proper legal form; opens, maintains, monitors and closes legal case files; maintains correspondence and records files.
- Maintains attorney appointment calendars; maintains a calendar of important court dates; files legal documents with courts as required.
- Tracks the receipt of and response to complaints; assists staff in ensuring timely responses.
- Takes and transcribes minutes of meetings as assigned.
- Screens phone calls; assists callers by providing information as authorized; exercises considerable judgment and discretion in dealing with sensitive and confidential matters.
- Serves as a primary point of contact for the General Counsel's office;
- Maintains confidential materials, records, files, and other privileged information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax machine, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- May serve as a lead worker over subordinate clerical or other support staff by prioritizing, assigning and monitoring their work and providing training as needed.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Legal forms, formats, documents, and terminology.
- Legal office procedures and practices.
- Modern office practices, procedures, and equipment.



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- Clerical processes pertaining to accounting, purchasing and data maintenance.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in digital or hard copy files.
- Clerical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Prepare legal documents that may require abstracting pertinent information from files and records using accepted formats and construction.
- Type finished copy from rough draft or machine transcription.
- Type at a corrected rate of 50 words per minute from clear copy.
- Maintain confidentiality of materials, records, files and other privileged information using tact, and discretion.
- Gather, record and summarize data in a variety of formats.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a computerized database.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Lead and motivate subordinate staff.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Two (2) years of legal secretarial experience. Formal legal secretarial training or paralegal training or experience may substitute for up to one (1) year of the required experience.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- Must maintain strict confidentiality of work-related information.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Legal Clerical



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Mechanic I

Bargaining Unit: VMU

DEFINITION:

Under general supervision, a Mechanic I performs a limited range of semi-skilled maintenance duties related to the repair and maintenance of METRO buses, vehicles, and other equipment while learning to perform the full scope of journey-level work; provides technical direction and assistance to lower level staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Mechanic I is the first working-level class in the series. An incumbent in this class performs routine a limited range of semi-skilled tasks related to the mechanical maintenance, repair, and modification of buses, automobiles, trucks and other equipment. This class is distinguished from the higher-level class of Mechanic II because in incumbent in the latter class performs the full scope of journey-level mechanic work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs a limited range of semi-skilled tasks in the mechanical maintenance, repair, and modification of buses, automobiles, trucks and other METRO vehicles and equipment and provides assistance to higher-level Mechanics.
- Removes and replaces seats and glass for doors and windows.
- Removes, installs and repairs electronic fare boxes, exterior advertising signs, and bike racks.
- Inspects, adjusts and repairs and/or replaces brakes; removes and installs tires.
- Performs safety and preventative maintenance inspections as required.
- Lubricates chassis, changes transmission and engine fluids and filters; inspects, removes, and replaces hoses and belts, bulbs and wiper blades.
- Learns to inspect equipment for needed repairs and to identify the parts, materials and time needed to conduct needed maintenance or repairs.
- Assists higher-level mechanics with repairing and adjusting compressed natural gas (CNG), diesel and gasoline engines, transmissions, and other vehicle systems and components; assists with maintaining, diagnosing, inspecting, and repairing CNG and diesel supply tanks, fuel delivery systems and related components.
- Learns to inspect, diagnose and repair vehicle electrical systems.
- Learns to inspect, reline and adjust brakes; remove and install tires; perform wheel alignments; and perform other vehicle maintenance tasks.
- May assist with emergency repair road calls.
- Learns to recognize potential safety hazards and make appropriate recommendations to higher-level staff.
- Fuels METRO equipment including gasoline, diesel and CNG vehicles.
- Maintains METRO property, tools, and equipment used in vehicle maintenance.
- Maintains a clean work area.



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Santa Cruz METRO

- Maintains accurate written and electronic records, logs and work orders.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Basic principles, practices, methods, equipment, materials, tools and procedures used in the maintenance, service, and repair of automotive and heavy-duty engine operation.
- Safe mechanical work practices.
- Basic vehicle and equipment overhaul and repair procedures.
- Engine tune-up procedures.
- Basic electrical and hydraulic systems.
- Proper use of hand, electric, pneumatic, and hydraulic tools and diagnostic equipment.
- Welding and oxygen-acetylene equipment used in the routine repair, maintenance, and service of vehicles.
- Standard electronic diagnostic equipment.
- Basic air brake systems.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Perform routine, semi-skilled duties related to the maintenance, repair, and alteration of fleet vehicles and equipment.
- Understand and follow oral and written instructions.
- Read and interpret technical manuals and schematics.
- Learn to diagnose and troubleshoot equipment problems.
- Operate welding equipment, brake drum lathes, drill presses, diagnostic equipment and other tools and equipment used in the repair, maintenance, and service of vehicles.
- Use manual and power tools and equipment safely.
- Learn to estimate costs and determines the materials and equipment needed to make vehicle and equipment repairs.
- Handle hazardous items and materials safely.
- Apply safe work practices and procedures around extremely high pressure and flammable CNG fuel.
- Make quick decisions in an emergency.
- Maintain records and control systems with accuracy and attention to detail.



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

One (1) year of progressively responsible experience performing heavy-duty mechanic work.

OR

Two (2) years of progressively responsible experience performing light-duty automotive repair work.

OR

Graduation from a certified maintenance training program (or program meeting METRO standards) AND six (6) months of experience performing mechanic work.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

AND

Must obtain a valid California Class B driver permit within one (1) month of employment AND must obtain a California Class B driver's license within three (3) months of employment.

SPECIAL REQUIREMENTS:

- Must possess tools (up to ¾ inch drive) necessary to perform the duties of the position and a rollaway toolbox.
- Driving record will be reviewed as part of the application process.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands



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Santa Cruz METRO

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 80 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work out in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO's drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



Attachment C

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Mechanic II

Bargaining Unit: VMU

DEFINITION:

Under general supervision, a Mechanic II performs skilled, journey-level maintenance work related to the repair and maintenance of METRO buses, vehicles, and other equipment; provides technical direction and assistance to lower level staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Mechanic II is the journey-level class in the series. An incumbent in this class performs a wide range of moderately difficult tasks related to mechanical maintenance, repair, and modification of buses, automobiles, trucks and other equipment. This class is distinguished from the lower-level class of Mechanic I because an incumbent in the latter class performs a limited range of routine tasks while learning to perform the full scope of journey-level work. This class may be distinguished from the higher-level class of Mechanic III because an incumbent in the latter class performs highly-skilled and very difficult mechanic work requiring more diagnostic skill and longer repair times.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs a variety of skilled tasks in the mechanical maintenance, repair and modification of buses, automobiles, trucks and other METRO vehicles and equipment.
- Inspects equipment for needed repairs; determines parts, materials and time needed to conduct needed maintenance or repairs; determines whether parts are in stock or must be ordered; requisitions or otherwise requests needed parts and materials to perform work.
- Performs semi-major overhauls under the direction of higher-level staff; repairs and adjusts compressed natural gas (CNG), diesel and gasoline engines, transmissions, and other vehicle systems and components; maintains, diagnoses, inspects, and repairs CNG and diesel supply tanks, fuel delivery systems and related components.
- Inspects, diagnoses and repairs vehicle electrical systems.
- Inspects, relines and adjusts brakes; removes and installs tires; performs wheel alignments; and performs other vehicle maintenance tasks.
- Performs safety and preventative maintenance inspections as required.
- May respond to and/or assist with emergency repair road calls.
- Recognizes potential safety hazards and makes appropriate recommendations to higher-level staff.
- Fuels METRO equipment including gasoline, diesel and CNG vehicles.
- Maintains METRO property, tools, and equipment used in vehicle maintenance.
- Maintains a clean work area.
- Maintains accurate written and electronic records, logs and work orders.
- Provides technical direction and assistance to lower level staff.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

- Operates standard office equipment including a computer, typewriter, photocopier machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, practices, methods, equipment, materials, tools and procedures used in the maintenance, service, and repair of transit diesel, spark-ignited and CNG engine operation.
- Vehicle and equipment overhaul and repair procedures.
- Diesel, gasoline and CNG engine tune-up procedures.
- Electrical and hydraulic system repairs.
- Air brake system repairs.
- Safe mechanical work practices.
- Proper use of hand, electric, pneumatic, and hydraulic tools and diagnostic equipment.
- Welding and oxygen-acetylene equipment used in the repair, maintenance, and service of vehicles.
- Standard electronic diagnostic equipment.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Perform a wide variety of duties related to the maintenance, repair, and alteration of fleet vehicles and equipment.
- Understand and follow oral and written instructions.
- Read and interpret technical manuals and schematics.
- Diagnose and troubleshoot equipment problems.
- Operate welding equipment, brake drum lathes, drill presses, diagnostic equipment and other tools and equipment used in the repair, maintenance and servicing of vehicles.
- Use manual and power tools and equipment safely.
- Estimate costs and determines the materials and equipment needed to make vehicle and equipment repairs.
- Ensure the safe handling of hazardous items and materials.
- Apply safe work practices and procedures around extremely high pressure and flammable CNG fuel.
- Make quick decisions in an emergency.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Provide technical direction and training to less skilled staff.
- Adhere to established work schedules and timelines.



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

- Work independently using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Two (2) years of progressively responsible experience equivalent to a Mechanic I with Santa Cruz METRO.

OR

Three (3) years of progressively responsible experience performing heavy-equipment mechanic work.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

AND

Must obtain a valid California Class B driver permit within one (1) month of employment AND must obtain a California Class B driver's license within three (3) months of employment.

SPECIAL REQUIREMENTS:

- Must possess tools (up to ¾ inch drive) necessary to perform the duties of the position and a rollaway toolbox.
- Driving record will be reviewed as part of the application process.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 80 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

Mental Demands



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work out in the field when needed. May require availability to work a flexible schedule.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must be able to respond to emergency situations seven days per week, 24 hours per day.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO's drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Mechanic III

Bargaining Unit: VMU

DEFINITION:

Under general supervision, a Mechanic III performs advanced and highly skilled maintenance work related to the repair and maintenance of METRO buses, vehicles, and other equipment; provides technical direction and assistance to lower level staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Mechanic III is the specialist-level class in the series. An incumbent in this class performs highly skilled and very difficult maintenance, repair, and modification of buses, automobiles, trucks and other equipment. This class is distinguished from the lower-level class of Mechanic II because an incumbent in the latter class performs journey-level work that requires less diagnostic skill and shorter repair times. This class may also be distinguished from the higher-level class of Senior Mechanic because an incumbent in the latter class serves as a lead worker over subordinate Mechanic staff.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs a variety of highly-skilled and difficult tasks in the mechanical maintenance, repair, and modification of buses, automobiles, trucks and other METRO vehicles and equipment.
- Inspects equipment for needed repairs; determines parts, materials and time needed to conduct needed maintenance or repairs; determines whether parts are in stock or must be ordered; requisitions or otherwise requests needed parts and materials to perform work.
- Performs major engine and vehicle system overhauls; repairs and adjusts compressed natural gas (CNG), diesel and gasoline engines, transmissions, and other vehicle systems and components; maintains, diagnoses, inspects, and repairs CNG and diesel supply tanks, fuel delivery systems and related components.
- Inspects, diagnoses and repairs vehicle electrical systems.
- Inspects, relines and adjusts brakes; removes and installs tires; performs wheel alignments; and performs other vehicle maintenance tasks.
- Performs safety and preventative maintenance inspections as required.
- Responds to emergency repair road calls.
- Recognizes potential safety hazards and makes appropriate recommendations to higher-level staff.
- Fuels METRO equipment including gasoline, diesel, and CNG vehicles.
- Maintains METRO property, tools, and equipment used in vehicle maintenance.
- Maintains a clean work area.
- Maintains accurate written and electronic records, logs and work orders.
- Provides technical direction and assistance to lower level staff.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

- Operates standard office equipment including a computer, typewriter, photocopier, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced principles, practices, methods, equipment, materials, tools and procedures used in the maintenance, service, and repair of transit diesel, spark-ignited and CNG engine operation.
- Advanced vehicle and equipment overhaul and repair procedures.
- Advanced diesel, gasoline and CNG engine tune-up procedures.
- Advanced electrical and hydraulic system repairs.
- Advanced air brake system repairs.
- Safe mechanical work practices.
- Proper use of hand, electric, pneumatic, and hydraulic tools and diagnostic equipment.
- Welding and oxygen-acetylene equipment used in the repair, maintenance, and service of vehicles.
- Standard electronic diagnostic equipment.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Perform highly-skilled and difficult duties related to the maintenance, repair, and alteration of fleet vehicles and equipment.
- Read and interpret complex technical manuals and schematics.
- Diagnose and troubleshoot complex equipment problems.
- Operate welding equipment, brake drum lathes, drill presses, diagnostic equipment and other tools and equipment used in the repair, maintenance and service of vehicles.
- Use manual and power tools and equipment safely.
- Estimate costs and determines the materials and equipment needed to make vehicle and equipment repairs.
- Ensure the safe handling of hazardous items and materials.
- Apply safe work practices and procedures around extremely high pressure and flammable CNG fuel.
- Make quick decisions in an emergency.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Provide technical direction and training to less skilled staff.
- Adhere to established work schedules and timelines.
- Work independently using good judgment and discretion.



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Two (2) years of progressively responsible experience equivalent to a Mechanic II with Santa Cruz METRO.

OR

Four (4) years of progressively responsible experience performing heavy-duty mechanic work. Experience must have also included rebuilding and repairing CNG, and/or diesel engines and related units and assemblies.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

AND

Must obtain a valid California Class B driver permit within one (1) month of employment AND must obtain a California Class B driver's license within three (3) months of employment.

SPECIAL REQUIREMENTS:

- Must possess tools (up to ¾ inch drive) necessary to perform the duties of the position and a rollaway toolbox.
- Driving record will be reviewed as part of the application process.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 80 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work out in the field when needed. May require availability to work a flexible schedule.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must be able to respond to emergency situations seven days per week, 24 hours per day.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO's drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Paralegal

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Paralegal performs legal technical work for the General Counsel; assists Counsel in preparing for litigation; performs legal research; interviews witnesses; assists with the preparation of legal documents; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Paralegal is the journey-level class in the series. An incumbent in this class performs a wide variety of technical legal activities under the supervision of an attorney, exercising considerable independent judgment in making decisions based on legal guidelines, processes or requirements. This class is distinguished from the higher-level class of Senior Paralegal because an incumbent in the latter class performs advanced paralegal work requiring specialized knowledge of complex human resources-related functions, policies and procedures.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Assists in the preparation of legal documents such as briefs, memos, settlement documents, resolutions, and ordinances; and performs research and prepares draft legal opinions.
- Researches, studies, and applies statutes, case law, legislation, and other legal authorities for use in the preparation of cases, opinions, pleadings, briefs, and other documents.
- Prepares questions and interviews witnesses; prepares METRO witnesses for depositions; prepares deposition summaries.
- Confers with METRO Counsel, investigators, employees, and other individuals regarding legal matters.
- Attends court and other legal forums with METRO Counsel as required.
- Files documents with courts, including reports, petitions, motions, briefs, ordinances, and other legal documents.
- Ensures all required documents and notices are filed or sent out within deadlines.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, methods, materials, and practices of legal research.
- Statutes and codes applicable to civil proceedings and claims.
- Legal document formats and filing procedures.
- Hearing procedures and rules of evidence.
- Preparation of routine procedural and substantive civil litigation.



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- Applicable court rules, including drafting and responding to pleadings.
- Pleading formats, citation style, content requirements, and local filing requirements.
- Civil litigation calendar management.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting legal information.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Draft legal documents such as briefs, memos, ordinances, and resolutions.
- Research, analyze, and apply legal principles, facts, evidence, and precedents to legal issues.
- Perform legal research.
- Communicate and present statements of fact, law, and argument clearly, logically and effectively.
- Interview and interact with the public, outside attorneys and METRO employees regarding discovery, case investigation, and trial preparation.
- Interpret, explain and apply laws, regulations, policies, and procedures.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Gather, record and summarize data in a variety of formats.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Paralegal certificate from an accredited school.

AND



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Two (2) years of experience as a paralegal, legal assistant or legal secretary.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- Must maintain strict confidentiality of work-related information.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Legal Technical



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Paratransit Eligibility Coordinator

Bargaining Unit: SEA

DEFINITION:

Under general direction, a Paratransit Eligibility Coordinator performs professional duties related to Americans with Disabilities Act (ADA) paratransit eligibility functions; determines customer eligibility for METRO paratransit services; conducts outreach to and educates the community, potential applicants and their families regarding available METRO paratransit and accessible services, consistent with the transportation provisions of the ADA; coordinates the ADA Paratransit Certification program; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Paratransit Eligibility Coordinator is a journey-level professional class. An incumbent in this class performs tasks related to METRO's paratransit eligibility functions, ensuring compliance with applicable laws and policies.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Coordinates and performs eligibility determination for METRO paratransit services including passenger certification, appeals, and recertification services in compliance with legal requirements and METRO policies; maintains up-to-date knowledge of applicable laws and policies.
- Monitors performance of contractor(s), ensuring full compliance with Federal ADA standards, established policies and procedures, and specific contractual terms; completes performance reviews and recommends appropriate action as needed.
- Performs data collection for performance measurements; reviews adequacy of service policies and procedures; and assists in the review of the impacts of potential service changes.
- Maintains detailed and accurate records of all eligibility determination activities; processes and maintains records for all passenger requests for ADA right to accessible transit and ADA paratransit eligibility, ensuring compliance with Federal mandates and METRO guidelines.
- Produces periodic statistical summaries and analytical reports for METRO management, the Board of Directors and others as required; provides department management with complete passenger data for all eligible riders in a timely manner.
- Serves as the METRO liaison for matters relating to paratransit eligibility; develops and maintains effective and cooperative relationships within the community and with other transit agencies; assists in the organization and preparation for events; hosts and attends public meetings; produces correspondence with all stakeholders, including, but not limited to, eligible passengers, applicants, disability services agencies, Federal and local officials, professional associations and others as needed.
- Reviews and makes appropriate determinations on immediate needs certification and other special requests as needed.



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- Performs a variety of customer service duties; provides information to passengers both in-person and over the telephone; processes identification cards for ParaCruz passengers, including taking required photos; conducts mobility and travel training for fixed route passengers; responds to customer service issues in the paratransit program; receives complaints and feedback from customers by phone or in person; forwards completed documents to the appropriate person.
- Assists in the preparation of the program budget and monitors costs throughout the year; provides updates to management as needed.
- Conducts orientations and training for new employees and temporary staff; may provide training to current staff, as assigned.
- Makes mathematical and statistical calculations.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Applicable Federal, State, and local laws and regulations pertaining to Department of Transportation regulations and policies governing Americans with Disabilities Act (ADA) Fixed Route and Paratransit service, including processing appeals and hearings.
- Local and regional transportation services with an emphasis on paratransit services.
- Analytical methods of researching, gathering, organizing and reporting data, including basic statistical analysis.
- Modern office practices, procedures, and equipment, including specialized software applicable to transit services.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing complex projects and analytical work.
- Public speaking techniques.
- Advanced time management techniques.
- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- Principles and practices of effective training.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Communicate detailed information about local and regional transit systems, including routes and scheduling.
- Analyze, interpret, explain, and apply relevant laws, policies, regulations, and requirements related to paratransit and accessible transit services.
- Provide information to the public in a clear, accurate, and effective manner.



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

- Work effectively with diverse individuals, including members of the disabled and older adult communities.
- Provide effective and responsive customer service, including in stressful situations.
- Address customer complaints in a sensitive and tactful manner.
- Negotiate solutions to difficult issues.
- Maintain a calm demeanor in stressful situations.
- Define complex problems and develop solutions using analytical techniques.
- Work independently using good judgment, tact, and discretion.
- Perform research and plan, organize and conduct analytical studies.
- Collect, analyze and interpret data, and prepare comprehensive reports of findings and recommendations.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in social science, human science, or a related field.

AND

Two (2) years of progressively responsible professional experience in program administration and monitoring.

Previous experience working in programs to serve the older adult and/or disabled communities is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands



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While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must participate in professional development activities.
- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Transit Operations Professional



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Parts and Materials Supervisor

Bargaining Unit: PSA

DEFINITION:

Under direction, a Parts and Materials Supervisor performs supervisory and skilled maintenance and administrative work related to requisitioning, receiving, inspecting, stocking and issuing of a variety of parts, equipment, tools, materials and supplies, including highly specialized items for facilities maintenance, custodial services, and vehicle maintenance activities; directs and ensures inventory control; prepares specifications for the ordering of requested items; assists management in overseeing the daily operating activities of assigned functions, including required record-keeping and other administrative support work; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Parts and Materials Supervisor is the supervisory-level class in the series. An incumbent in this class is responsible for supervising subordinate staff that requisition, receive, inspect, stock and issue a variety of parts, equipment, tools, materials, and supplies for multiple METRO departments. Work requires advanced knowledge of storekeeping and purchasing methods as well as related departmental policies, practices, and procedures. This class is distinguished from the lower-level class of Senior Stock Clerk because an incumbent in the latter class serves as a lead worker over subordinate Stock Clerks.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Supervises the work of subordinate staff; schedules, assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Reviews all invoices and shipping documents to ensure items received are correctly entered into inventory via computer and/or charged on a work order to the correct asset(s).
- Monitors the “out of service” list for buses that are out of service and waiting on parts; ensures that orders have been placed and timely delivery is made.
- Directs the weekly inventory of parts by groups (Perpetual Inventory); gathers data, prints out counting sheets, directs the inventory process, reconciles results of inventory physical count, and makes adjustments as required.
- Recommends the addition of new inventory items; adds new item numbers into the computerized inventory system; updates part numbers as required; prints item labels for shelving.
- Assists staff in identifying the more difficult items to be purchased; researches catalogs, parts manuals, the Internet, and other sources; orders parts with vendors online, over the phone, or by submitting purchase requisitions according to METRO policies.
- Researches, schedules, and assembles training materials and conducts weekly safety training for assigned staff.
- Gathers, tracks, tabulates and analyzes data pertaining to assigned functions; creates reports for management.



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- Monitors the accumulation of generated hazardous waste, such as used engine oil filters, waste oils, and coolant, used fluorescent lamp bulbs and waste absorbent products, etc., and arranges for pickup and disposal of items.
- Monitors the battery core program; arranges shipment back to vendors and follows up with vendors to get core credits.
- Administers and oversees METRO's MSDS program; ensures that all chemicals received and purchased are entered into the system.
- Participates in the daily work of requisitioning, receiving, inspecting, stocking and issuing materials and supplies and performing other Stock Clerk/Senior Stock Clerk duties.
- Performs data entry to update and maintain information in digital files; compiles and prepares data for statistical and accounting reports; may create spreadsheets and other tools to track information.
- May type correspondence and other documents; answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Standard and specialized equipment, parts, tools and supplies required for maintaining light and heavy-duty vehicle systems, and their appropriate storage.
- Standard and specialized equipment, parts and supplies required to maintain a wide variety of non-vehicular equipment and facilities, and their appropriate storage.
- Standard and specialized equipment, parts and supplies required for custodial work as well other general operational needs of a transit agency, and their appropriate storage.
- Laws governing assigned functions and responsibilities.
- Advanced principles and methods of maintaining a standard inventory of high demand items.
- Advanced methods of determining the availability and best price for equipment, parts, tools, and supplies.
- Standard processes pertaining to purchasing and related data maintenance.
- Modern office practices, procedures, and equipment.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:



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- Supervise and motivate subordinate staff effectively.
- Provide safety-related and other training to staff and ensure a safe work environment.
- Supervise and participate in the identification and procurement of a wide variety of tools, equipment, parts, supplies and other items requested by customers.
- Research the availability and price of requested items.
- Maintain and reconcile a large and complex inventory of items.
- Read and comprehend a variety of technical parts manuals, schematics, and safety-related documentation.
- Supervise the maintenance of an adequate inventory of high-demand items and ensure their appropriate storage.
- Ensure a safe and organized work area.
- Ensure the safe handling of items hazardous in nature.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a forklift after receiving appropriate training.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent quarter) units from an accredited college, including coursework in automotive or heavy equipment mechanics, business administration, or a related field.

AND

Four (4) years of progressively responsible experience receiving, stocking, issuing and maintaining inventory of automotive and heavy-duty transit parts and supplies. Experience must have also included at least two (2) years of inventory control responsibility AND one (1) year in a lead worker capacity.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands



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While performing the duties of this job, the employee is regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop environment where the noise level may be loud and there is potential exposure to fumes, dust, grease, air contaminants, hazardous materials and chemicals.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Payroll Technician

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Payroll Technician performs technical administrative work related to timekeeping and payroll functions for a single METRO bargaining unit or department; maintains payroll records and files; processes and audits electronic timekeeping records using an electronic timekeeping system; prepares and maintains payroll-related statistical records and reports; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Payroll Technician is the journey-level class in the series. An incumbent in this class performs technical duties related to the preparation, administration, and maintenance of payroll for a single department or bargaining unit, in accordance with Federal and State laws, rules, and regulations. This class is distinguished from the higher-level class of Senior Payroll Technician because an incumbent in the latter class has overall responsibility for organization-wide payroll processing and administers payroll activities impacting all METRO employees.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Administers payroll for a single METRO department or bargaining unit; audits timekeeping records for accuracy and makes correcting entries; inputs payroll information using an electronic timekeeping system; codes information for entry into computer records; applies labor contract provisions related to overtime rules and other special pay categories.
- Maintains, monitors and updates spreadsheets and other electronic tools for tracking and reporting absences, vacation use, over time, leave balances, and a variety of other payroll categories; compiles timekeeping and payroll data and develops, prepares, distributes, maintains, and files a variety of statistical and informational reports for management; verifies accuracy of payroll systems and reports and ensures that payroll activities comply with internal control procedures.
- Receives and reviews personnel actions; reviews pay or status changes such as appointments, changes in status, leaves and separations, and enters into payroll system.
- Identifies, develops, recommends and implements procedural and payroll system improvements.
- Prepares requested documents for internal, external and governmental auditors as required.
- Responds to questions and researches payroll related problems; provides information to management and departmental personnel regarding payroll and labor contract application.
- Assists with other technical administrative activities; may process workers' compensation forms; may track occupational illnesses and injuries; may assist with compiling data for budgetary purposes.
- Maintains confidential materials, records, files and other privileged information.
- Initiates, composes and/or types various department memos, letters, reports, statistical data, and other narrative documents.



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- Answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes standard business and specialized METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of technical payroll administration.
- Principles, practices, and terminology of accounting and financial record-keeping procedures.
- Principles and practices of the Fair Labor Standards Act (FLSA) and other related payroll laws and regulations.
- State laws for record-keeping related to payroll processing.
- Taxable and non-taxable compensation principles.
- Methods of researching and resolving payroll issues.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Interpret, explain and apply payroll-related policies, procedures, and regulations.
- Interpret and apply labor contract provisions relating to payroll and benefits.
- Perform automated payroll data entry.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Gather, record and summarize data in a variety of formats.
- Maintain records and control systems with accuracy and attention to detail.
- Input timekeeping data into a payroll system.
- Design, prepare, and compile reports and information.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Perform mathematical calculations quickly and accurately.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 30 semester (or equivalent) units from an accredited college, including 12 units in accounting, business administration or a related field.

AND

Two (2) years of experience requiring technical bookkeeping, payroll accounting, financial clerical or related work, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Technical

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Planning Data Analyst

Bargaining Unit: SEA

DEFINITION:

Under direction, a Planning Data Analyst performs professional analytical duties related to transportation planning functions and processes; collects, prepares and analyzes service data for the advancement of planning and scheduling projects, Federal and State reporting requirements, and grant applications; communicates and coordinates with the farebox provider to monitor software data collection methods and equipment, new fare media, and new fare tracking methods; tracks the department budget, processes invoices, and handles other administrative duties as needed; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Planning Data Analyst is a journey-level professional class. An incumbent in this class performs a wide range of tasks requiring knowledge, interpretation and application of specialized transportation planning administrative requirements, analysis and preparation of data and reports to meet various regulatory requirements, and other analytical duties to support departmental administrative functions.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Gathers ridership and other data relative to service performance using systems feedback data and field survey data collection; runs data queries of primary research from field surveys, GPS-based vehicle location systems, and fare media; monitors service statistic sources and data integrity.
- Analyzes, validates, evaluates and summarizes service data; forecasts potential federal funding sources.
- Utilizes service data to fulfill State, Federal and local reporting requirements; prepares narrative and statistical reports, maps, graphics and charts, including recommendations based on data analysis; coordinates the interdepartmental submission of the monthly and annual reporting to the National Transit Database.
- Validates and collects farebox and other system operational data to identify trends, deficiencies and forecasts, and to produce inputs for various documents such as short-range transportation plans.
- Coordinates and communicates with the farebox provider to maintain current service and/or modify service as needed.
- Administers departmental budgets; participates in and coordinates the annual budget development process; develops revenue and expenditure forecasts; processes invoices to track departmental spending against the established budget.
- Makes mathematical and statistical calculations; updates and maintains planning databases and directories.
- Provides information to employees and the public; responds to comments, complaints and requests from METRO staff, Board members, the public, and other agencies.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.



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- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Applicable Federal, State and local laws governing transit operations, including funding programs and data reporting requirements.
- Budget methods for operating and short- and long-term transportation capital funding.
- Principles of transit operations and route development.
- The development of key performance indicators pertinent to transportation programs.
- Professional methods of researching, gathering, organizing and reporting data.
- Techniques for surveying and transmitting information.
- Financial and statistical analysis methods.
- Budgeting and financial analysis concepts and practices, including cost analysis and modeling.
- Community interrelationships.
- Computer software common to the planning function (i.e., word processing, spreadsheet, modeling, mapping) at the intermediate level.
- Project management methods and techniques.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios and percentages.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Analyze transit data derived from computer models, cost/benefit analyses and public input.
- Read, analyze, understand and interpret complex planning-related reports and documents.
- Conduct cost/benefit, impact and other related technical analyses.
- Formulate a response to inquiries or complaints from customers, regulatory agencies, local government representatives, citizen groups or members of the business community.
- Keep abreast of current trends in the transit field.
- Write letters, memorandums, board, planning and technical reports and fact sheets designed to be understood by all audiences, including the public.
- Design graphics/maps using computer/drawing software for publication studies.
- Prioritize projects based on established criteria.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.



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Santa Cruz METRO

- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in public administration, business administration, transportation planning or a related field.

AND

Two (2) years of recent professional experience performing transportation planning or administrative analysis for a public transportation system.

Proficiency with Geographic Information Systems (GIS) and HASTUS software, as well as advanced proficiency with Microsoft Excel, are desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- Must participate in professional development activities.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Professional Administrative

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Planning Program Aide

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Planning Program Aide performs routine duties to assist with transit planning activities; collects a variety of transit data while on METRO buses, in the field and on the telephone; tabulates and summarizes data; prepares data for computer input; conducts other routine clerical duties; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Planning Program Aide is a journey-level planning support class. An incumbent in this class performs routine clerical and other support tasks that require basic knowledge and application of departmental policies, practices and procedures.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Counts passengers as they board and deboard buses; records schedule adherence to gather required service planning data; compiles data for various transit-related studies and surveys and assists in the compilation and summarization of service planning data.
- Surveys or interviews METRO passengers and the public on buses, in the field or on the telephone.
- Tabulates passenger counts; compiles totals, computes percentages and summarizes survey results.
- Calculates route distances and travel times for METRO routes.
- Prepares field sheets, line summaries and related forms using computer hardware and software.
- May assist with special projects and presentations to the public to support METRO public information and marketing.
- Performs routine general clerical work as assigned; may prepare documents, answer telephones, maintain files and provide information to the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Modern office practices, procedures and equipment.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of maintaining information in computerized or hard copy files.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division and percentages.



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- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Maintain basic records and control systems with accuracy and attention to detail.
- Input data into a computerized database.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

One (1) year of clerical experience requiring numerical recordkeeping, routine numerical research or statistical reporting using personal computers.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate. May occasional do field work.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Planning Clerical

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Purchasing Agent

Bargaining Unit: SEA

DEFINITION:

Under direction, a Purchasing Agent performs journey-level professional duties related to the acquisition, approval, receipt, and record-keeping for purchased equipment, materials, services and supplies; receives and processes purchase requisitions and purchase orders; sources vendors; negotiates pricing as well as other terms and conditions; generates purchase orders, service agreements and contracts; prepares and issues requests for proposals and invitations for bids and coordinates vendor selection processes; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Purchasing Agent is a journey-level professional administrative class. An incumbent in this class performs tasks requiring advanced knowledge, interpretation, and application of specialized purchasing policies and procedures to ensure that assigned activities comply with various legal, regulatory, policy and other requirements.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Reviews purchase requisitions for completeness and conformance with METRO policies as well as State and/or Federal laws; issues purchase orders for services, materials, supplies, and equipment; negotiates term with vendors and performs vendor reviews to ensure receipt of proper quality and quantity of materials.
- Prepares contracts and other documents for the purchase of supplies, services, and equipment; submits documents for review by METRO counsel and execution by the General Manager; prepares notifications of awards and distributes contracts.
- Consults with departments regarding bid and proposal specifications; prepares and issues requests for proposals and invitations for bids for procurements of equipment, service, and construction projects; writes advertisements to invite bids and proposals; prepares vendor lists and distributes bid/proposal packages; coordinates and schedules pre-bid and pre-proposal packages and conferences; conducts bid openings; participates in bid evaluation; writes recommendations to the Board for vendor selection.
- Ensures purchasing activities conform to applicable laws, regulations (including U.S. Department of Transportation regulations), and METRO policies; assists in the development of METRO policies and procedures for requisitioning, bidding, warehousing and distributing supplies, materials, and equipment.
- Meets and corresponds with prospective vendors, manufacturers, service suppliers, and sales representatives for product information; may investigate and resolve problems involving damaged goods, incorrect merchandise or invoicing errors, and unsatisfactory service performance.
- Meets and corresponds with other transit agency procurement officers to develop cooperative procurement contracts for equipment, materials, and supplies used by transit agencies.



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- Evaluates vendor performance and maintains vendor history records; conducts price and cost analysis, prepares, processes and maintains records correspondence, documents, and reports related to the purchasing function; assists in the development and maintenance of a computerized purchasing system.
- Drafts reports for the Board of Directors relating to the procurement of professional services, construction, vehicles and equipment as required by the District.
- Coordinates the notice, sale, and disposal of surplus vehicles and equipment.
- Maintains record-keeping for purchasing statistics related to DBE vendors and contractors; gathers data; assists in the preparation of DBE periodic reports.
- May supervise or lead the work of subordinate technical or clerical staff as an ancillary duty.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of public agency purchasing.
- State and Federal laws and regulations applicable to public sector purchasing, including third party contracting.
- Contract development, negotiations, and competitive bidding processes.
- Pricing, products, and services related to the transportation industry and sources of supply.
- Methods of conducting product and vendor research.
- The creation and use of spreadsheets, databases, and software to track information and automate calculations.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Principles and practices of supervision and leadership.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Evaluate, interpret and apply policies, procedures, and requirements as they apply to professional purchasing activities.
- Perform professional purchasing activities in a manner that complies with applicable laws, regulations, and policies.



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- Review requisitions and prepare product specifications, bids, and agreements.
- Evaluate quotations and bids and make awards consistent with METRO purchasing policies and requirements.
- Research and identify the price and availability of items to be purchased.
- Maintain complex and detailed records and control systems with accuracy and attention to detail.
- Create and use spreadsheets, databases, and software to track information.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Lead or supervise the work of subordinate technical or clerical staff.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in public administration, business administration, accounting or a related field.

AND

Two (2) years of experience performing professional purchasing work, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands



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Santa Cruz METRO

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- Must participate in professional development activities.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Professional

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Purchasing Technician

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Purchasing Technician performs technical duties to support the acquisition, approval, receipt, and record-keeping for purchased equipment, materials, services and supplies; receives and processes purchase requisitions and purchase orders; communicates with vendors to research, resolve and maintain product, price and delivery discrepancies; maintains purchasing records and files; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Purchasing Technician is a journey-level technical administrative class. An incumbent in this class performs tasks requiring interpretation and application of specialized purchasing policies and procedures to ensure that assigned activities comply with various legal, regulatory, policy and other requirements. This class may be distinguished from the higher-level class of Purchasing Agent because an incumbent in the latter class performs professional purchasing work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Receives and processes routine purchasing requisitions; analyzes requisitions for compliance with METRO standards and ensures information is complete and accurate; identifies possible suppliers; assists customers with determining specification requirements on requested items.
- Performs routine purchasing assignments; obtains price quotes and places orders.
- Investigates, assesses, and resolves straightforward products such as damaged goods and incorrect merchandise, failure to deliver on time, vendor billing problems, or other problems, complaints or discrepancies; contacts vendors and suppliers and appropriate internal departments to resolve issues.
- Files and maintains purchase orders and purchasing-related documentation.
- Uses a company credit card (Cal-Card) on selected small purchases within established authorization limits; maintains related records; reconciles Cal-Card statements and follows up with departments regarding discrepancies.
- Communicates with departments regularly regarding placed orders and answers questions on the status of orders; assists with the coordination of deliveries, services, and related matters.
- Serves as a liaison with vendors and suppliers; explains METRO purchasing policies and procedures.
- Reads the terms and conditions applicable to new vendors and flags discrepancies with METRO purchasing policies.
- Provides training and re-training to various METRO staff regarding purchasing procedures and the use of automated purchasing software.
- Responds to Public Records Requests as assigned.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.



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- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Basic principles and practices of public agency purchasing.
- Basic State and Federal laws and regulations applicable to public sector purchasing.
- Basic purchasing terminology and methods.
- General types and sources of equipment, materials, and supplies used by a transportation authority.
- The creation and use of computerized spreadsheets, databases, and software to track information and automate calculations.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Evaluate, interpret and apply policies, procedures, and requirements as they apply to technical purchasing activities.
- Perform technical purchasing activities in a manner that complies with applicable laws, regulations, and policies.
- Research and identify the price and availability of items to be purchased.
- Maintain complex and detailed records and control systems with accuracy and attention to detail.
- Create and use spreadsheets, databases, and software to track information.
- Perform financial calculations quickly and accurately.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 30 semester (or equivalent) units from an accredited college, including coursework in public administration, business administration or a comparable field of coursework.

AND

Two (2) years of experience performing technical purchasing work, preferably in a public agency.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is often required to reach with hands and arms; walk and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, kneel, crouch, and stand. Occasional lifting up to 20 pounds unaided may be required. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is usually moderate. May require availability to work a flexible schedule.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Administrative Technical



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Revenue Collection Clerk

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Revenue Collection Clerk performs clerical duties related to the collection and processing of transit vehicle revenues; collects fares from revenue vehicles; processes and prepares revenue for transfer and deposit; collects passenger counts and prepares ridership reports; may perform general office or support work; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Revenue Collection Clerk is a journey-level clerical class. An incumbent in this class performs routine clerical and field tasks that require a basic knowledge and application of departmental policies, practices and procedures. This class is distinguished from the higher-level class of Revenue Collection Supervisor because an incumbent in the latter class performs supervisory and advanced revenue collection work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Pulls and replaces farebox vaults from revenue vehicles; opens farebox vaults under a secure and prescribed procedure; coordinates with supervisors to determine which fare boxes need to be pulled.
- Collects and counts money using currency and other counting equipment; totals and records cash revenue; prepares transfer and bank deposit documents.
- Collects, counts and totals fares received in the form of tokens, passes and other receipts; separates, sorts and records passes, count cards and other passenger recordings.
- Supplies and maintains currency machines at transit centers; delivers equipment and supplies to METRO facilities as assigned.
- Prepares periodic reports including ridership counts, equipment use and maintenance records.
- May train others in revenue collection procedures; may review work for errors.
- May perform other routine clerical duties as needed such as preparing timekeeping and attendance records, typing documents, completing forms, entering data into computerized systems, maintaining files and records, answering phones, ordering supplies, and compiling data for reports.
- May assist in monitoring security contractors.
- May perform basic housekeeping duties in the counting room such as sweeping and dusting; may perform minor servicing and orderly arranging of equipment.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; operates specialized revenue and fare counting equipment.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Modern office practices, procedures and equipment.



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Santa Cruz METRO

- Principles and methods of currency counting and cash recordkeeping.
- Security measures to safeguard large sums of cash.
- Basic clerical processes pertaining to data entry and recordkeeping.
- Basic methods of maintaining information in computerized or hard copy files.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Basic money handling procedures including counting large sums of money.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Follow oral and written instructions accurately.
- Count and record currency and passenger fare receipts accurately and safely, in accordance with established procedures.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Input data into a computerized database.
- Maintain a calm demeanor in stressful situations.
- Perform work using good judgment and discretion.
- Type routine documents and forms.
- Balance multiple assignments simultaneously and effectively.
- Maintain confidentiality of materials, records, files and other privileged information.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a METRO vehicle to various work locations as required.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

One (1) year of clerical experience requiring revenue collection, cashiering and/or handling and counting large sums of money.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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Santa Cruz METRO

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is often required to reach with hands and arms; walk and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, kneel, crouch, and stand. Occasional lifting up to 20 pounds unaided may be required. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; uses basic math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee primarily works in a standard office environment where the noise level is moderate. May perform field work as needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Clerical



Attachment C

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Revenue Collection Supervisor

Bargaining Unit: PSA

DEFINITION:

Under direction, a Revenue Collection Supervisor performs supervisory and clerical work related to the collection of fares from revenue vehicles; processes and prepares revenue transfers and deposits; collects passenger counts and prepares ridership reports; performs various administrative support duties associated with departmental activities; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Revenue Collection Supervisor is the supervisory-level class in the series. An incumbent in this class performs work that requires a basic knowledge and application of supervisory principles, clerical procedures and departmental policies. This class is distinguished from the lower-level class of Revenue Collection Clerk because an incumbent in the latter class performs journey-level clerical duties primarily emphasizing the collection and recording of farebox revenues.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Supervises subordinate staff; schedules, assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Develops and implements revenue collection procedures and ridership surveys and counts.
- Oversees and coordinates with contractors that participate in revenue collection activities, including the secure transportation of revenues.
- Communicates and coordinates with other METRO staff, outside agencies and the public as needed to implement assigned responsibilities.
- Works with outside auditors to verify cash balances and departmental financial records.
- Participates in revenue collections work by retrieving revenues from vehicles, collecting and counting currency and other fare revenues, preparing records of revenues received, and preparing deposits.
- Researches and gathers information to prepare periodic reports including ridership counts, equipment use and maintenance records; identifies data trends and prepares summaries for management.
- Performs other clerical duties as required.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; operates specialized revenue and fare counting equipment.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.



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- Principles and practices of transit revenue collection operations, currency counting and cash record-keeping.
- Security measures to safeguard large sums of money.
- Modern office practices, procedures and equipment.
- Clerical processes pertaining to data entry, purchasing, and recordkeeping.
- Methods of maintaining information in computerized or hard copy files.
- Clerical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Supervise and motivate subordinate staff effectively.
- Count and record currency and passenger fare receipts in accordance with established procedures.
- Maintain records and control systems with accuracy and attention to detail.
- Adhere to established work schedules and timelines.
- Perform mathematical computations accurately.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Input data into a computerized database.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a METRO vehicle to perform assignments as required.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent quarter) units from an accredited college, including coursework in business administration, accounting, or a related field.

AND

Two (2) years of clerical experience requiring revenue collection, cashing and/or handling and counting large sums of money.

Previous supervisory experience is desirable.



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LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is often required to reach with hands and arms; walk and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, kneel, crouch, and stand. Occasional lifting up to 20 pounds unaided may be required. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; uses basic math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee primarily works in a standard office environment where the noise level is usually moderate. May work out in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Clerical



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Safety and Training Coordinator

Bargaining Unit: PSA

DEFINITION:

Under direction, a Safety and Training Coordinator performs specialized professional administrative work related to planning, developing, updating, coordinating and conducting bus operator training and retraining programs and ensuring compliance with State and federally-mandated bus operator programs as well as METRO policies and procedures; develops and updates curriculum, lesson plans, and training/reference materials; participates in the development and updating of accident investigation procedures and processes as well as departmental safety procedures; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Safety and Training Coordinator is a professional program coordinator class. An incumbent in this class is responsible for planning, developing and coordinating the delivery of required training programs for bus operators.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Plans, develops, updates, coordinates and conducts bus operator training and retraining programs, ensuring compliance with State and federally-mandated bus operator programs as well as METRO policies, procedures and labor agreements.
- Develops and updates curriculum, lesson plans, training and reference materials for Bus Operators, Transit Supervisors and other METRO employees; develops a training procedures manual as well as other documentation, materials, and processes; revises and updates documentation as needed.
- Plans and develops training schedules; coordinates schedules with Transit Supervisors that assist with training and retraining of Bus Operators and other METRO employees.
- Assists the Base Superintendent with administering the DMV Employer Testing Program, including maintenance of examiner credentials; coordinates the DMV “pull program” and ensures that all employees meet licensing requirements; participates in CHP/DMV and other audits.
- Develops and coordinates ongoing line instruction programs, including the training of line instructors on monitoring, grading, reporting and program compliance criteria.
- Coordinates the accident review process; reviews completed accident reports and identifies patterns; documents and reports on recommendations for improvements; maintains records of accidents; prepares summary reports.
- Coordinates and oversees the maintenance of accurate training records and documentation, including records of driver training hours, VTT certification, and bus operator training certification.
- Oversees and participates in the evaluation of new Operators during training; provides recommendations regarding Operator retention based on training information; may participate in direct observations of Operator skills as required; recommends corrective action or re-training as appropriate; provides input on the selection of new Bus Operators as requested.
- Participates in the delivery of training instruction as required, including basic VTT classes; develops and may provide customized or specialized trainings as requested.



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- May represent METRO at disciplinary hearings, legal proceedings and other meetings.
- Supervises subordinate Safety and Training Instructors and may supervise technical, clerical or support staff; assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Coordinates and performs special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Federal, State, and local laws and regulations regarding transit buses, Department of Motor Vehicle and Federal Highway Administration laws, and bus operator training and retraining.
- Current teaching theory, methods, and practices, as well as effective curriculum development.
- Principles of program organization, administration and coordination.
- Common transit agency policies, procedures and bus operator labor contract parameters language associated with bus operations.
- Defensive driving techniques.
- Safety and health-related regulations applicable to transit operations.
- Principles and practices of employee supervision, including employee development, performance evaluation and progressive discipline.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software, including audio/visual equipment.

Ability to:

- Develop, organize, and coordinate an effective bus operator training program.
- Formulate specific objectives to compare and evaluate training results.
- Research, analyze and evaluate new training methods and techniques.
- Read, review and apply laws, regulations and labor contract provisions.
- Define problem areas and evaluate, recommend and implement alternative solutions to complex issues and problems.



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- Instruct others in the safe operation of METRO vehicles and adapt training procedures to the needs of the individual.
- Act as liaison with community groups, transit districts and regulatory agencies.
- Develop and write plans, procedures, reports, forms and tests.
- Conduct field investigations to identify patterns and problem areas and make recommendations.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university; and two (2) years of experience developing and presenting driver safety and training programs, preferably for a public bus transportation system.

OR

Five (5) years of experience as a transit supervisor for a medium to large agency providing bus transportation, including responsibility for driver training and VTT training.

LICENSES AND CERTIFICATES:

Possession of a valid Class B commercial driver license with passenger endorsement, verification of transit training (VTT), and an acceptable safe driving record/history is required at the time of appointment.

AND

Possession of a California State Bus Driver Training Instructor Certificate from the Department of Education at time of appointment.

OR

Possession of a Department of Transportation Instructor Credential to teach VTT classes at time of appointment.

SPECIAL REQUIREMENTS:

- Driving record will be reviewed as part of the application process.
- May occasionally require working extended hours or hours outside of regular schedule.



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PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in an office environment where the noise level is quiet. The employee occasionally works in a field environment with potential exposure to varied weather conditions, dust, fumes, and hazardous materials and where the noise level is loud.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.

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*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Professional



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Safety and Training Instructor

Bargaining Unit: PSA

DEFINITION:

Under general supervision, a Safety and Training Instructor performs technical and instructional duties related to training and re-training Bus Operators and other METRO staff in the proper and safe operation of transit buses and other METRO vehicles in accordance with Federal, State and local laws as well METRO policies, procedures and labor agreements; assists in the development of curriculum, lesson plans, and training/reference materials; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Safety and Training Instructor is a journey-level technical class. An incumbent in this class is primarily responsible for delivering required training programs for bus operators and other METRO staff while also performing other technical administrative duties.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Conducts training and re-training for Bus Operators and other METRO staff in the proper and safe operation of transit buses and other METRO vehicles in accordance with Federal, State, and local law as well METRO policies, procedures, and labor agreements.
- Assists with developing and updating curriculum, lesson plans, training schedules and reference materials for Bus Operators, Transit Supervisors, and other METRO employees; provides support to Transit Supervisors who assist with training and retraining of Bus Operators and other METRO employees.
- Performs ride checks during new Operator probation periods and in-service checks for veteran Operators; provides retraining of qualified line instructors as needed; acts as the designated examiner in the testing and certification of Operators.
- Assists the Base Superintendent with implementing the Department of Motor Vehicles (DMV) Employer Testing Program, including maintenance of examiner credentials; assists with administering the DMV "pull program" by ensuring that all employees meet licensing requirements.
- Maintains accurate training records and documentation, including records of driver training hours, Verification of Transit Training (VTT) certification, and bus operator training certification.
- Provides input to the evaluation of new Operators during training; provides recommendations regarding Operator retention based on training information; may participate in direct observations of Operator skills as required; recommends corrective action or re-training as appropriate; provides input on the selection of new Bus Operators as requested.
- Participates in special projects.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.



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EMPLOYMENT STANDARDS:

Knowledge of:

- Federal, State, and local laws and regulations regarding transit buses, including DMV and Federal Highway Administration laws pertaining to bus operator training and retraining.
- Current teaching theory, methods, and practices, as well as effective curriculum development.
- Defensive driving techniques.
- Safety and health-related regulations applicable to transit operations.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in digital or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages, and basic statistics.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software, including audio/visual equipment.

Ability to:

- Provide transit bus operator training in accordance with Federal, State, and local laws as well as METRO policies, procedures, and labor agreements.
- Read, review and apply laws, regulations and labor contract provisions.
- Instruct others in the safe operation of METRO vehicles and adapt training procedures to the needs of the individual.
- Develop and write plans, procedures, reports, forms, and tests.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent) units from an accredited college

AND



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One (1) year of experience developing and presenting driver safety and training programs, preferably with a public bus transportation system.

OR

Three (3) years of experience as a transit supervisor for a medium to a large agency providing bus transportation, including responsibility for driver training and VTT training.

LICENSES AND CERTIFICATES:

Possession of a valid Class B commercial driver license with passenger endorsement, Verification of Transit Training (VTT), and an acceptable safe driving record/history is required at the time of appointment.

AND

Possession of a California State Bus Driver Training Instructor Certificate from the Department of Education at time of appointment.

OR

Possession of a Department of Transportation Instructor Credential to teach VTT classes at the time of appointment.

SPECIAL REQUIREMENTS:

- Driving record will be reviewed as part of the application process.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in an office environment where the noise level is quiet. The employee frequently works in a field environment with potential exposure to varied weather conditions, dust, fumes, and hazardous materials and where the noise level is loud.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.



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- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Technical

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Safety Program Specialist I

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Safety Program Specialist I performs a limited range of professional administrative duties related to implementing and maintaining workplace safety programs in compliance with Cal-OSHA requirements as well as METRO policies and procedures; collects and analyzes data and produces reports; investigates workplace accidents/incidents and claims filed against METRO; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Safety Program Specialist I is the first working-level class in the series. An incumbent in this class performs a limited range of professional program administrative duties while learning to perform the full scope of journey level work. This class may be distinguished from the higher-level class of Safety Program Specialist II because an incumbent in the latter class performs the full scope of journey-level professional administrative work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Implements workplace safety programs in compliance with Cal-OSHA requirements as well as METRO policies and procedures.
- Implements the System Safety Program Plan and other METRO safety programs; reviews and conducts inspections of facilities and hazardous materials; evaluates workplace chemical usage; maintains compliance data; conducts hazard assessments and compliance audits; discusses procedural changes and requirements with departments; and addresses recurring issues.
- Provides information to the Safety, Security and Risk Manager regarding injury and property damage claims to assist in the determination of METRO liability; collects accident/incident information; verifies medical treatment expenses and lost wages; compiles value of property damage.
- Investigates accidents/incidents for both internal METRO incidents and external incidents; interviews and takes statements of claimants, employees, and witnesses; visits accident/incident scenes and takes pictures and measurements; analyzes events; examines property damage; obtains injury information; interprets management practices; assesses findings in order to make recommendations regarding cause, severity and action; and generates a final written report.
- Maintains and tracks records; prepares reports on status of claims; organizes materials and documents claim files; maintains accurate records and files.
- Researches changes in Federal and State health and safety laws and codes, including occupational safety and health regulations at both the State and Federal levels.
- Makes recommendations to the Safety, Security and Risk Manager of policy changes needed to maintain compliance.
- Assists METRO departments with the implementation of emergency response planning; coordinates drills implementing emergency plans; makes recommendations on areas of improvement and efficiency; responds to various emergencies.



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- Identifies and processes recovery actions for damages METRO sustained from vehicle accidents, tenant lease agreements, and other related expenses.
- Implements and facilitates workplace safety and environmental training programs; produces and schedules monthly safety awareness topics; assists team members in other safety areas; maintains training records.
- Determines workplace safety training needs; recommends, develops and conducts training of employees regarding safety related issues such as safety awareness, ergonomics, Cal-OSHA requirements, and proper use of safety equipment.
- Assists with workplace safety regulatory compliance; submits compliance related reports, inspection forms, and other records; evaluates corrective action issues and regulatory changes/interpretations; obtains samples for analytical analysis.
- Develops various workplace safety analysis tools such as key performance indicators, dashboards and scorecards to track and analyze trends and monthly outcomes; reviews all workplace injuries and performs focused training to help other employees avoid such injuries; performs field safety observations to assess safety on buses and at METRO facilities.
- Prepares and provides appropriate information and required documentation as needed for small claims court hearings.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; operates photography equipment; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Cal-OSHA regulations.
- Applicable Federal, State and local safety regulations, laws and standards.
- Proper presentation of safety regulatory compliance regulations such as legal placement of warning signs.
- Industry workplace safety standards and best management practices.
- Effective presentation methods.
- Hazard analysis and implications throughout the system life cycle.
- Tools and techniques of data collection, on scene evidence collection and interviewing witnesses.
- Applied preventative/predictive failure analysis, risk assessment and deductive reasoning.
- Accident investigation and hazard analysis.
- Claims investigation methods, techniques and settlement negotiations.
- Methods of legal and factual research.
- Basic discovery requirements.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in computerized or hard copy files.
- Professional methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.



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- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software, including audio/visual equipment.

Ability to:

- Interpret safety laws and regulations and resolve conflicting regulations.
- Ensure compliance from employees and supervisors regarding issues with METRO's safety programs.
- Procure required documentation from vendors to ensure compliance.
- Perform timely notification of incidents in accordance with safety and risk management program requirements.
- Use tools and equipment for incident/accident investigations and hazard assessments.
- Understand and apply laws and administrative policies and procedures in the evaluation of routine property and liability insurance claims.
- Investigate accident scenes, analyze events, and draw sound conclusions.
- Develop and write correspondence, plans, procedures, reports, and forms.
- Conduct field investigations to identify patterns and problem areas and make recommendations.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in environmental health/safety, occupational health/safety or a related field.

AND

One (1) year of professional experience in system safety program planning, industrial hygiene, environmental health/safety or occupational health/safety.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

AND



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Possession of a Cal-OSHA Safety and Health certificate is required at the time of appointment.

Possession of a Cal-OSHA Advanced Safety and Health certificate is desirable.

Additional OSHA coursework related to risk management and claims resolution is desirable.

SPECIAL REQUIREMENTS:

- Must participate in professional development activities.
- Fluency in both English and Spanish is required.
- May occasionally require working extended hours or hours outside of regular schedule.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Administrative Professional



Attachment C

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Safety Program Specialist II

Bargaining Unit: SEA

DEFINITION:

Under direction, a Safety Program Specialist II performs professional administrative duties related to designing, developing, implementing and maintaining workplace safety programs in compliance with Cal-OSHA requirements as well as METRO policies and procedures; collects and analyzes data and produces reports; investigates workplace accidents/incidents and claims filed against METRO; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Safety Program Specialist II is the journey-level class in the series. An incumbent in this class performs the full-scope of journey-level professional administrative work related to implementing mandatory workplace safety programs and training. This class may be distinguished from the lower-level class of Safety Program Specialist I because an incumbent in the latter class performs a limited range of duties while learning to perform the full scope of journey-level work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Designs, develops and maintains workplace safety programs in compliance with Cal-OSHA requirements as well as METRO policies and procedures.
- Implements the System Safety Program Plan and other METRO safety programs; reviews and conducts inspections of facilities and hazardous materials; evaluates workplace chemical usage; maintains compliance data; conducts hazard assessments and compliance audits; discusses procedural changes and requirements with departments; and addresses recurring issues.
- Provides information to the Safety, Security and Risk Manager regarding injury and property damage claims to assist in the determination of METRO liability; collects accident/incident information; verifies medical treatment expenses and lost wages; compiles value of property damage.
- Investigates accidents/incidents for both internal METRO incidents and external incidents; interviews and takes statements of claimants, employees, and witnesses; visits accident/incident scenes and takes pictures and measurements; analyzes events; examines property damage; obtains injury information; interprets management practices; assesses findings in order to make recommendations regarding cause, severity and action; and generates a final written report.
- Maintains and tracks records; prepares reports on status of claims; organizes materials and documents claim files; maintains accurate records and files.
- Researches changes in Federal and State health and safety laws and codes, including occupational safety and health regulations at both the Federal and State levels.
- Makes recommendations to management regarding policy changes needed to maintain compliance.
- Assists METRO departments with the implementation of emergency response planning; coordinates drills implementing emergency plans; makes recommendations on areas of improvement and efficiency; responds to various emergencies.



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- Identifies and processes recovery actions for damages METRO sustained from vehicle accidents, tenant lease agreements, and other related expenses.
- Implements, assists and facilitates workplace safety and environmental training programs; produces and schedules monthly safety awareness topics; assists team members in other safety areas; maintains training records.
- Determines workplace safety training needs; recommends, develops and conducts training of employees regarding safety related issues such as safety awareness, ergonomics, Cal-OSHA requirements, and proper use of safety equipment.
- Assists with workplace safety regulatory compliance; submits compliance related reports, inspection forms, and other records; evaluates corrective action issues and regulatory changes/interpretations; obtains samples for analytical analysis.
- Develops various workplace safety analysis tools such as key performance indicators, dashboards and scorecards to track and analyze trends and monthly outcomes; reviews all workplace injuries thoroughly and performs focused training to help other employees avoid such injuries; performs field safety observations to assess safety on buses and at METRO facilities.
- Prepares and provides appropriate information and required documentation as needed for small claims court hearings.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; operates photography equipment; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Cal-OSHA regulations.
- Applicable Federal, State and local safety regulations, laws and standards.
- Proper presentation of safety regulatory compliance regulations such as legal placement of warning signs.
- Industry workplace safety standards and best management practices.
- Effective presentation methods.
- Hazard analysis and implications throughout the system life cycle.
- Tools and techniques of data collection, on scene evidence collection and interviewing witnesses.
- Applied preventative/predictive failure analysis, risk assessment and deductive reasoning.
- Accident investigation and hazard analysis.
- Claims investigation methods, techniques and settlement negotiations.
- Methods of legal and factual research.
- Basic discovery requirements.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Methods of maintaining information in computerized or hard copy files.
- Analytical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing complex projects and analytical work.
- Advanced time management techniques.



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- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software, including audio/visual equipment.

Ability to:

- Interpret safety laws and regulations and resolve conflicting regulations.
- Ensure compliance from employees and supervisors regarding issues with METRO's safety programs.
- Procure required documentation from vendors to ensure safety compliance.
- Perform timely notification of incidents in accordance with safety and risk management program requirements.
- Use tools and equipment for incident/accident investigations and hazard assessments.
- Understand and apply laws and administrative policies and procedures in the evaluation of routine property and liability insurance claims.
- Investigate accident scenes, analyze events, and draw sound conclusions.
- Develop and write correspondence, plans, procedures, reports, and forms.
- Conduct field investigations to identify patterns and problem areas and make recommendations.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in environmental health/safety, occupational health/safety or a related field.

AND

Three (3) years of professional experience in system safety program planning, industrial hygiene, environmental health/safety or occupational health/safety.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.



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AND

Possession of a Cal-OSHA Advanced Safety and Health certificate is required at time of appointment.

Additional Cal-OSHA coursework related to risk management and claims resolution is desirable.

SPECIAL REQUIREMENTS:

- Must participate in professional development activities.
- Fluency in both English and Spanish is required.
- May occasionally require working extended hours or hours outside of regular schedule.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is usually moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.

*Adopted: 00-00-00
 *BOD Approved: 00-00-00
 *Revised: 00-00-00
 *Job Family: Administrative Professional



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Scheduling Specialist

Bargaining Unit: SEA

DEFINITION:

Under direction, a Scheduling Specialist performs technical duties to support METRO planning activities by utilizing computerized scheduling software to develop transit routes, operating schedules, and related documents according to Planning Department guidelines; develops block sheets, Operator paddles, extra board lists and other bid materials; responds to feedback from various sources by proposing, testing and establishing approved route changes; reviews and analyzes transit operations data to produce reports used in evaluating and improving transit service; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Scheduling Specialist is a journey-level, specialized technical class. An incumbent in this class performs a wide range of tasks requiring technical knowledge of bus operations as well as basic knowledge of transportation planning policies, procedures and requirements.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Utilizes computerized scheduling software to develop transit routes, operating schedules, and related documents according to Planning Department guidelines; revises existing routes and schedules based on feedback from a variety of sources including customer requests, patronage data, vehicle running times, traffic patterns, street closures, and other information.
- Monitors current service levels for potential route/schedule changes to improve efficiency, productivity and effectiveness and considering numbers of stops, length of routes and runs per shift; tests proposed route and schedule changes using computerized models; balances and verifies schedules, work runs and personnel requirements for accuracy and compliance with applicable provisions and guidelines; participates in test trips of new or revised transit routes; may develop routes as part of restructuring or research projects.
- Prepares Operator bids and special bids as required by the collective bargaining agreements; develops block sheets, Operator paddles, extra board lists and other related materials for Operator bids.
- Develops and maintains statistical data related to schedules, work runs, personnel requirements and service costs; assists in projecting the cost of route and schedule changes based on Operator pay categories.
- Prepares a variety of correspondence as well as periodic and ad hoc reports as required; prepares Operator bid and schedule information for payroll purposes.
- Performs research and survey activities for various service planning projects.
- Assists Information Technology with the development, enhancement, testing, maintenance and support of computer applications used for schedule planning, schedule building, run cutting and data collection; provides subject matter expertise on operational and business requirements; tests new techniques and aids to scheduling as they become available.



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- Explains pending route and service changes to members of the public and representatives of community organizations as part of an outreach team; reviews customer complaint letters; assists in preparing responses and recommends changes as appropriate.
- Proofreads schedule materials or electronic schedule information prior to publication.
- Attends meetings as directed; communicates and meets with union representatives during development of the Operator bid as directed.
- Makes mathematical and statistical calculations.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Federal, State and local laws governing transit operations.
- Principles of transit operations and route development and the development of key performance indicators.
- Technical methods of researching, gathering, organizing and reporting data.
- Techniques for surveying and transmitting information.
- Basic statistical analysis methods.
- Community interrelationships.
- Computer software common to the route and schedule planning function (i.e., word processing, spreadsheet, modeling, mapping) at the intermediate level.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record keeping and filing systems.
- Methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, ratios and percentages.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Use transit data derived from computer models, cost/benefit analyses and public input to propose and establish bus routes and Operator schedules.
- Utilize specialized computer programs and other tools to create bus routes and schedules.
- Read, analyze, understand and interpret planning-related reports and documents.
- Conduct technical data analyses.
- Formulate a response to inquiries or complaints from customers, regulatory agencies, local government representatives, citizen groups or members of the business community.
- Keep abreast of current trends in the transit field.



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- Write letters, memorandums and technical reports and fact sheets designed to be understood by all audiences, including the general public.
- Prioritize projects based on established criteria.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 60 semester (or equivalent quarter) units from an accredited college, including coursework in urban or transportation planning, public administration, business administration or a related field.

AND

Two (2) years of recent transit operations experience, including responsibility for scheduling, dispatching, bus operations or related duties.

Experience working with transit scheduling software is desirable.

Bachelor's degree is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands



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While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Planning Technical

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Attachment C

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Senior Custodial Service Worker **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Senior Custodial Service Worker performs lead worker as well as janitorial and related tasks at METRO facilities; ensures that facility interiors and exteriors are clean and orderly; performs minor building maintenance duties; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Custodial Service Worker is the advanced-level class in the series. An incumbent in this class leads and performs janitorial and routine facility maintenance duties necessary to maintain clean, sanitary, and safe conditions in various METRO facilities. This class is distinguished from the lower-level class of Custodial Service Worker because an incumbent in the latter class performs journey-level custodial duties and does not have formal lead-worker responsibilities. This class is distinguished from the higher-level class of Custodial Supervisor because an incumbent in the latter class supervises the work of subordinate custodial staff and is also responsible for ensuring the availability of materials, supplies, and equipment.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Serves as a lead worker over subordinate Custodial Service Workers by prioritizing, assigning and monitoring work and providing training as needed; may provide input on performance evaluations.
- Inspects METRO facilities to ensure compliance with standards of cleanliness and maintenance and verify appropriate health and safety conditions; inspects equipment and tools to ensure proper maintenance and operating condition; documents inspection findings; advises staff of needed corrections.
- Performs routine inspections of heating and ventilating systems; conducts routine troubleshooting and/or repair of fans, motors, and other facility equipment; may perform routine repairs on janitorial equipment, tools, and machinery; may perform minor plumbing, painting, electrical, grounds or related facility maintenance repairs as needed.
- Identifies maintenance and repair work requiring the assistance of higher-level staff and reports the situation to the supervisor in a timely manner.
- Responds quickly to reports of safety, sanitary and fire hazards; ensures immediate hazards are addressed appropriately and that repairs/corrections are scheduled/completed.
- Respond to customer complaints if appropriate or refer to a supervisor.
- Places orders and maintains inventory of cleaning and maintenance supplies.
- Coordinates the preparation of facilities for meetings and events as assigned; leads and participates in special cleaning activities as well as setting up, moving and/or arranging furniture or equipment.
- Conducts safety checks by checking for locked doors, temperature readings for heating and air conditioning, and on/off switches for machines.



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- Ensures safe usage of chemical cleaning materials in compliance with METRO policies and procedures and in compliance with Cal-OSHA regulations.
- Performs the duties of a Custodial Service Worker as required.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Acceptable standards for the cleaning and routine maintenance of public facilities.
- Applicable laws, regulations, policies, procedures and general safety practices related to janitorial work.
- Standard and specialized equipment, parts, tools and supplies required for commercial janitorial work.
- Operation of janitorial equipment such as buffers, carpet cleaners, floor strippers, and other cleaning equipment.
- Commercial cleaning practices, supplies, and equipment.
- Proper use of various cleaning chemicals.
- Basic building and grounds maintenance techniques, including routine plumbing, painting, electrical and landscaping activities.
- Basic operation and maintenance of heating and ventilating equipment.
- Standard tools, terminology, and practices used in skilled maintenance trades.
- Time management techniques.
- Basic mathematical skills to create proper dilutions of cleaning products.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Understand and follow oral and written directions.
- Serve as a lead worker over subordinate staff.
- Lead and perform a wide variety of janitorial and routine facility maintenance duties in an effective and safe manner.
- Perform minor mechanical repairs.
- Oversee the safe operation of janitorial equipment.
- Oversee the safe use of chemical cleaning agents.
- Prepare operational reports.
- Work with moderate independence using good judgment, tact, and discretion.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Interact effectively and courteously with the public and address customer complaints in a sensitive and tactful manner.
- Use basic mathematical skills including addition, subtraction, multiplication, division, and fractions.



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- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a METRO vehicle to perform assignments as required.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Three (3) years of progressively responsible experience performing facility cleaning, maintenance, and minor repair activities, including some experience with basic carpentry, painting, electrical, plumbing, heating or ventilating repair work.

Previous lead worker experience is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is often required to reach with hands and arms; walk, stand and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects. The employee is regularly required to stoop at the waist, kneel, crouch, crawl and climb. Occasional lifting up to 25 pounds unaided may be required. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; uses basic mathematical skills; solves routine problems; deals with multiple concurrent tasks; and interacts with others encountered during work.

Work Environment:

The employee works in various facilities where there is frequent exposure to moving mechanical parts and is occasional exposure to hot, wet and/or humid conditions, fumes, toxic or caustic chemicals. The noise level is usually moderate. The employee is occasionally exposed to varied weather conditions.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Custodial

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Senior Customer Service Representative

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Senior Customer Service Representative performs lead worker and advanced customer service work related to providing information and assistance regarding transit services to customers; conducts transit-related special projects which may include marketing, public information, and community outreach activities; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Customer Service Representative is the advanced-level class in the series. An incumbent in this class serves as a lead worker, performs the more advanced customer service functions in a call center or information booth, and assists with outreach/public relations functions. This class may be distinguished from the lower-level class of Customer Service Representative because an incumbent in the latter class performs journey-level duties and does not have formal lead worker responsibilities. This class may be distinguished from the higher-level class of Customer Service Supervisor because an incumbent in the latter class supervises the work of subordinate customer service staff.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Serves as a lead worker over subordinate staff by prioritizing, assigning and monitoring work and providing training as needed; may provide input on performance evaluations.
- Performs sales and cashiering activities using print encoding media (PEMs) and/or selling transit tickets, passes, and coupons; operates a cash register and performs credit card transactions; takes photographs of customers for purposes of creating identification badges; reconciles booth sales.
- Provides information to the public regarding transit services, including the location of bus stops, routes, detours, fares, transfers, and policies; responds to inquiries about pass eligibility, photo identification, lost and found, and bus schedule publication and distribution.
- Creates ride reservations for Paratransit-eligible customers; negotiates trip options and times with customers and their service providers; calculates fares, arranges for client call-backs; processes cancellations and no-shows; maintains related records and documentation.
- Receives and responds to public information requests; receives and processes compliments, complaints, and service improvement suggestions.
- Participates in outreach and public relations activities and may represent METRO at special events; may assist with the design and preparation of brochures, informational flyers, written articles, and news releases.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; operates a cash register and photography equipment; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.



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EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Modern office practices, procedures, and equipment, including multi-line telephone systems.
- Applicable Federal, State, and local laws and regulations pertaining to Department of Transportation regulations and policies governing Americans with Disabilities Act (ADA) Fixed Route and Paratransit service.
- Regulations, policies, and procedures affecting METRO customers.
- Specialized scheduling software.
- Local and regional transportation services.
- Principles and methods of currency counting and cash record-keeping.
- Effective customer service techniques.
- Public speaking techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Serve as a lead worker over subordinate staff.
- Provide information to the public in a clear, accurate and effective manner.
- Count and record currency and passenger fare receipts accurately and safely, in accordance with established procedures.
- Demonstrate excellent public relations skills, obtaining and providing information in a clear, accurate and professional manner.
- Communicate detailed information about local and regional transit systems, including routes and scheduling.
- Address customer complaints in a sensitive and tactful manner.
- Assist with designing and preparing a variety of public information, marketing, and planning materials and presentations.
- Maintain a calm demeanor in stressful situations.
- Maintain confidentiality of materials, records, files and other privileged information using tact and discretion.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a METRO vehicle to perform assignments as required.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Utilize specialized equipment such as ticketing machines, cash registers, and photo identification printers.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Two (2) years of progressively responsible clerical customer service experience equivalent to a Customer Service Representative with Santa Cruz Metro.

Fluency in English and Spanish is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee may work in a standard office, call center or information booth environment where the noise level is usually moderate. May work in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Customer Service



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Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Senior Facilities Maintenance Worker **Bargaining Unit: SEA**

DEFINITION:

Under general supervision, a Senior Facility Maintenance Worker performs lead worker as well as semi-skilled and skilled tasks related to the maintenance, repair, and construction of METRO facilities, properties, and related equipment; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Facilities Maintenance Worker is the advanced-level class in the series. An incumbent in this class leads and performs a wide variety of semi-skilled and skilled facility maintenance work that includes the maintenance and repair of tools and equipment. This class is distinguished from the lower-level class of Facilities Maintenance worker because an incumbent in the latter class performs the full-scope of journey level facilities maintenance duties. This class is also distinguished from the higher-level class Facilities Maintenance Supervisor because an incumbent in the latter class supervises the work of subordinate facilities maintenance staff.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Serves as a lead worker over subordinate staff by prioritizing, assigning and monitoring work and providing training as needed; may provide input on performance evaluations; maintains employee attendance records.
- Receives and prioritizes work requests and distributes work to staff.
- Leads and performs semi-skilled and skilled work related to the maintenance, repair, construction and remodeling of METRO facilities, properties, and related equipment.
- Inspects facilities and related equipment for needed repairs including lighting, electrical, plumbing, roofing, HVAC and mechanical systems; inspects walls, windows, locks, and doors; tests and checks landscaping and irrigation systems.
- Determines materials and time needed to conduct needed maintenance or repairs; requisitions or otherwise requests needed materials and equipment to perform work; meets with vendors or contractors as necessary to review project activities.
- Performs maintenance, repair, construction or remodeling work utilizing carpentry, plumbing, electrical, painting, door/window, locksmith, alarm, roofing, and related trade skills.
- Maintains and repairs washers, lifts, cranes, water and air systems, pumping systems, dispensing systems and other.
- Monitors and maintains secondary storage systems including above-ground waste storage and hazardous materials storage; pumps out waste collection systems; collects stormwater runoff samples for hazardous testing.
- Offloads Compressed Natural Gas (CNG) and diesel fuel from trucks to METRO fueling facilities; monitors fuel station; implements emergency procedures for spill recovery as required.
- Performs landscaping and hardscaping repair and maintenance; installs concrete; paints buildings; repairs benches.



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- Operates a variety of manual and power tools and equipment including hand tools, bench and table tools, welding tools and landscaping tools; operates vehicles such as dump trucks, truck mounted cranes and forklifts.
- Prepares time and materials estimates for assigned projects.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Principles, practices, methods, equipment, materials, and tools used in the maintenance and repair of buildings and facilities, including carpentry, plumbing, painting, concreting, masonry, HVAC, welding, mechanical and electrical work.
- Uniform Building and Electrical codes.
- Operation and maintenance of internal combustion engines and hydraulic equipment.
- Occupational hazards of the maintenance trades and appropriate safety equipment and practices.
- Methods and equipment used in groundskeeping operations.
- Safe operation and maintenance of hand and power tools.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Serve as a lead worker over subordinate staff.
- Perform a wide variety of maintenance, repair, construction and remodeling to facilities, properties, buildings, and related equipment.
- Read and interpret building and mechanical codes, blueprints, plans, and technical manuals.
- Diagnose and troubleshoot equipment problems.
- Estimate costs and determine materials and equipment needed to make building and equipment repairs.
- Use manual and power tools and equipment safely.
- Make quick decisions in an emergency.
- Ensure the safe handling of hazardous items and materials.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.



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- Adhere to established work schedules and timelines.
- Work independently using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Two (2) years of experience equivalent to a Facilities Maintenance Worker with Santa Cruz METRO.

OR

One (2) years of journey-level experience in one of the following building trades: carpentry, electrical, plumbing, welding or painting. (Note: journey-level status typically requires four (4) years of formal training or apprenticeship).

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is often required to reach with hands and arms; walk, stand and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, crawl, kneel, crouch, and climb. Occasional lifting up to 50 pounds unaided may be required. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered during work.

Work Environment:

The employee works in a shop environment where the noise level is usually noisy. The employee may work outdoors in varied weather conditions with potential exposure to fumes, dust, grease, air



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contaminants, hazardous materials and chemicals. Work requires heavy physical labor and working in confined spaces.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Facilities

DRAFT



Attachment C

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Senior Mechanic

Bargaining Unit: VMU

DEFINITION:

Under general supervision, a Senior Mechanic performs lead worker and skilled maintenance work related to the repair, alteration, and service of METRO vehicles and related equipment; coordinates, assigns and oversees the day-to-day work performed by Mechanic staff; performs skilled and complex repair and maintenance of METRO buses, vehicles, and related fleet equipment; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Mechanic is the advanced and lead-level class in the series. An incumbent in this class performs highly-skilled and very difficult maintenance, diagnostic, troubleshooting, overhaul, and repair work on buses, automobiles, trucks and other equipment and also serves as a lead worker over subordinate Mechanics. This position may be distinguished from the lower-level class of Mechanic III because an incumbent in the latter performs advanced technical work but is not assigned the full scope of lead worker duties.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Serves as a lead worker over subordinate staff by prioritizing, assigning and monitoring work and providing training as needed; may provide input on performance evaluations; maintains employee attendance records.
- Receives and prioritizes work requests and distributes work to staff.
- Leads and performs a variety of skilled and semi-skilled tasks in the mechanical maintenance, repair and modification work on buses, automobiles, trucks and other METRO equipment, including the full scope of lower level Mechanic duties.
- Inspects the work of Mechanics and other fleet staff, providing technical assistance and training as needed.
- Performs a variety of highly-skilled and difficult tasks in the mechanical maintenance, repair, and modification of buses, automobiles, trucks and other METRO vehicles and equipment.
- Inspects equipment for needed repairs; determines parts, materials and time needed to conduct needed maintenance or repairs; determines whether parts are in stock or must be ordered; requisitions or otherwise requests needed parts and materials to perform work.
- Performs major engine and vehicle system overhauls; repairs and adjusts compressed natural gas (CNG), diesel and gasoline engines, transmissions, and other vehicle systems and components; maintains, diagnoses, inspects, and repairs CNG and diesel supply tanks, fuel delivery systems and related components.
- Inspects, diagnoses and repairs vehicle electrical systems.
- Inspects, relines and adjusts brakes; removes and installs tires; performs wheel alignments; and performs other vehicle maintenance tasks.
- Performs safety and preventative maintenance inspections as required.



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- Responds to emergency repair road calls.
- Recognizes potential safety hazards and makes appropriate recommendations to higher-level staff.
- Fuels METRO equipment including gasoline, diesel and CNG vehicles.
- Maintains METRO property, tools, and equipment used in vehicle maintenance.
- Maintains clean a work area.
- Maintains accurate written and electronic records, logs and work orders.
- Provides technical direction and assistance to lower level staff.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Advanced vehicle and equipment overhaul and repair procedures.
- Advanced diesel, gasoline and CNG engine tune-up procedures.
- Advanced electrical and hydraulic system repairs.
- Advanced air brake system repairs.
- Safe mechanical work practices.
- Proper use of hand, electric, pneumatic, and hydraulic tools and diagnostic equipment.
- Welding and oxygen-acetylene equipment used in the repair, maintenance, and service of vehicles.
- Standard electronic diagnostic equipment.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Serve as a lead worker over subordinate staff.
- Read and interpret complex technical manuals and schematics.
- Diagnose and troubleshoot complex equipment problems.
- Operate welding equipment, brake drum lathes, drill presses, diagnostic equipment and other tools and equipment used in the repair, maintenance, and service of vehicles.
- Use manual and power tools and equipment safely.
- Estimate costs and determines the materials and equipment needed to make vehicle and equipment repairs.



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

- Ensure the safe handling of hazardous items and materials.
- Apply safe work practices and procedures around extremely high pressure and flammable CNG fuel.
- Make quick decisions in an emergency.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Provide technical direction and training to less skilled staff.
- Adhere to established work schedules and timelines.
- Work independently using good judgment and discretion.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

One (1) year of responsible experience equivalent to a Mechanic III with Santa Cruz METRO.

OR

Three (3) years of progressively responsible experience equivalent to a Mechanic II with Santa Cruz METRO.

OR

Five (5) years of progressively responsible experience performing heavy-duty mechanic work. Experience must have also included rebuilding and repairing CNG, and/or diesel engines and related units and assemblies.

Previous lead worker experience is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

AND

Must obtain a valid California Class B driver permit within one (1) month of employment AND must obtain a California Class B driver's license within three (3) months of employment.

SPECIAL REQUIREMENTS:



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- Must possess tools (up to ¾ inch drive) necessary to perform the duties of the position and a rollaway toolbox.
- Driving record will be reviewed as part of the application process.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 80 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work out in the field when needed. May require availability to work a flexible schedule.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must be able to respond to emergency situations seven days per week, 24 hours per day.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO's drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Senior Paralegal

Bargaining Unit: SEA

DEFINITION:

Under direction, a Senior Paralegal performs advanced and specialized legal technical work for the Chief Executive Officer, General Counsel, and Human Resources Director by assisting with complex human resources functions while also providing advanced support for litigation and related legal matters; assists with administering workers' compensation, employee leave, and other Human Resources programs; assists Counsel in preparing for litigation by performing legal research, interviewing witnesses and preparing legal documents; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Paralegal is the journey-level class in the series. An incumbent in this class performs advanced and specialized technical legal activities requiring knowledge of complex human resources-related functions, policies and procedures as well as general paralegal processes. This class is distinguished from the lower-level class of Paralegal because an incumbent in the latter class performs journey-level paralegal work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Reviews, tracks, and monitors employee leave documentation; drafts correspondence and prepares reports and documentation for employee leaves including, but not limited to, FMLA/CFRA/PDL, disability retirement, long term disability, and request for life insurance waivers; communicates and coordinates with department managers and employees on documentation regarding employee leaves, return to work plans, and workers' compensation status.
- Assists in monitoring workers' compensation cases from inception to final disposition; reviews and processes workers' compensation claim forms and related documents; audits, reviews, corrects and prepares statements from workers' compensation contractors and providers; provides information to supervisors and employees regarding employee status; monitors employee absences.
- Prepares and maintains workers' compensation logs, posters, reports, notices and related records and materials; assists management in maintaining regulatory compliance in the workers' compensation program; acts as liaison between other departments, the workers' compensation claims administrator, insurance carriers, contractors and others; monitors workers' compensation claim payments and other administrative expenses.
- Tracks and maintains union contracts and management compensation plan changes and agreements.
- Tracks the 60-day window for employee COBRA eligibility; processes COBRA enrollment for former employees, dependents and retirees electing to enroll in COBRA dental and vision benefits.
- Administers METRO's Lactation Accommodation Program; communicates with employees returning from maternity leave and schedules use of lactation accommodation rooms.
- Processes records requests according to the California Public Records Act and responds to Title II/Title VI/ADA/504 complaints pursuant to METRO's policies; communicates and coordinates



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with department managers and employees regarding legal inquiries and document subpoenas received from Superior Court; responds to employee and public inquiries, documents requests, and subpoenas.

- Drafts and files legal documents such as reports, contracts, indemnity agreements, ordinances, and other legal documents; confers with the CEO, General Counsel, investigators, employees, and other individuals regarding legal matters; researches, studies, and applies statutes, case law, legislation, and other legal authorities for use in litigation filings; drafts policies and regulations for review by General Counsel.
- Assists with legal matters related to CalTIP claims and the Disadvantaged Business Enterprise (DBE) Program.
- Assists with preparing and administering departmental budgets; assists in preparing purchasing documents; assists in maintaining information in the Human Resources Information System (HRIS); assists with tracking drug and alcohol testing.
- Prepares training materials and presentations to management; prepares staff reports for Council Board meetings and draft resolutions.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, methods, materials, and practices of legal research.
- Federal and State leave related regulations including FMLA/CFRA/PDL.
- General laws, regulations, procedures, and practices pertaining to workers' compensation claims processing as well as other specialized human resources activities.
- Clerical processes pertaining to accounting, purchasing, and data maintenance.
- Statutes and codes applicable to civil proceedings and claims.
- Legal document formats and filing procedures.
- Hearing procedures and rules of evidence.
- Preparation of routine procedural and substantive civil litigation.
- Applicable court rules, including drafting and responding to pleadings.
- Pleading formats, citation style, content requirements, and local filing requirements.
- Civil litigation calendar management.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting information.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.



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Ability to:

- Draft legal documents including complex briefs, memos, ordinances, and resolutions.
- Research, analyze, and apply complex legal principles, facts, evidence, and precedents to legal issues.
- Communicate and present statements of fact, law, and argument clearly, logically and effectively.
- Interview and interact with the public, outside attorneys and District employees regarding discovery, case investigation, and trial preparation.
- Interpret, explain and apply legal and human resources policies, procedures and regulations.
- Gather, analyze, and summarize complex information presented in a variety of formats.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Develop and maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Paralegal certificate from an accredited school.

AND

Three (3) years of legal experience as a paralegal, legal assistant, or legal secretary. Experience must have included at least one (1) year of technical human resources experience, preferably with responsibility in leave administration, workers' compensation, and employee drug testing.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires



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stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.
- Must maintain strict confidentiality of work-related information.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Legal Technical



Attachment C

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Senior Payroll Technician

Bargaining Unit: SEA

DEFINITION:

Under direction, a Senior Payroll Technician performs advanced technical administrative work related to timekeeping and payroll matters impacting all METRO bargaining units and departments; coordinates and maintains centralized payroll records and files; prepares and maintains complex payroll-related statistical records and reports; coordinates and performs special payroll or accounting-related projects; processes and audits electronic timekeeping records using an electronic timekeeping system; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Payroll Technician is the advanced-level class in the series. An incumbent in this class performs advanced technical duties related to the organization-wide preparation, administration, and maintenance of payroll in accordance with Federal and State laws, rules, and regulations. This class is distinguished from the lower-level class of Payroll Technician because an incumbent in the latter class performs journey-level technical payroll processing and administration for a single METRO department or bargaining unit.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Administers centralized, organization-wide payroll activities impacting multiple departments and or bargaining units; audits timekeeping records for accuracy and makes correcting entries; inputs payroll information using an electronic timekeeping system; uses codes information for entry into computer records; applies labor contract provisions related to overtime rules and other special pay categories.
- Maintains, monitors and updates spreadsheets and other electronic tools for tracking and reporting absences, vacation use, over time, leave balances, and a variety of other payroll categories; compiles timekeeping and payroll data and develops, prepares, distributes, maintains, and files a variety of statistical and informational reports for management; verifies accuracy of payroll systems and reports and ensures that payroll activities comply with internal control procedures.
- Prepares and electronically submits all payroll documents to payroll contractor; corrects errors prior to export; communicates with contractors on payroll issues, questions, deadlines, and procedures; responds to questions from employees, supervisors, and managers regarding timekeeping, direct deposit, accruals, and other and payroll issues.
- Maintains payroll records, reviews absence tracking information and reports, and adjusts as required.
- Receives and reviews personnel actions submitted by multiple departments; reviews pay or status changes such as appointments, changes in status, leaves, and separations and enters into payroll system.
- Requests and collects payroll documents, trust warrants, and topics paychecks from payroll contractor; communicates with the payroll contractor and internal departments.



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- Identifies, develops, recommends and implements procedural and payroll system improvements; coordinates with other METRO departments regarding timekeeping rules and procedures; recommends solutions to problems and provides timekeeping system training; responds to questions and researches payroll related problems; provides information to management and departmental personnel regarding payroll and labor contract application.
- Prepares requested documents for internal, external and governmental auditors as required.
- Works with Information Technology staff to maintain system integrity, troubleshoot technical issues and test the payroll system after configuration changes or updates; utilizes and maintains procedures for electronic payroll timekeeping system; reviews payroll procedures and recommends changes.
- Assists with other technical administrative activities; may process workers' compensation forms; may track occupational illnesses and injuries; may assist with compiling data for budgetary purposes.
- Maintains confidential materials, records, files and other privileged information.
- Initiates, composes and/or types various department memos, letters, reports, statistical data, and other narrative documents.
- Answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes standard business and specialized METRO computer software in performing job tasks.
- May provide functional direction to other staff performing payroll-related duties.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced principles and practices of technical payroll administration.
- Principles, practices, and terminology of accounting and financial record-keeping procedures.
- Principles and practices of the Fair Labor Standards Act (FLSA) and other related payroll laws and regulations.
- State laws for record-keeping related to payroll processing.
- Taxable and non-taxable compensation principles.
- Advanced methods of researching and resolving payroll issues.
- Modern office practices, procedures, and equipment.
- Business correspondence, formatting and report writing.
- Methods of maintaining information in digital or hard copy files.
- Technical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:



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- Interpret, explain and apply complex payroll-related policies, procedures, and regulations.
- Interpret and apply labor contract provisions relating to payroll and benefits.
- Perform automated payroll data entry.
- Maintain confidentiality of materials, records, files, and other privileged information.
- Gather, record and summarize data in a variety of formats.
- Maintain records and control systems with accuracy and attention to detail.
- Input timekeeping data into a payroll system.
- Design, prepare, and compile reports and information.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Perform mathematical calculations quickly and accurately.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Completion of 30 semester (or equivalent) units from an accredited college, including 12 units in accounting, business administration or a related field.

AND

Four (4) years of experience requiring technical bookkeeping, payroll accounting, financial clerical or related work, preferably in a public agency. Experience must have included at least two (2) years of experience administering departmental or agency-wide payroll activities.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require



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lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Payroll

DRAFT



Attachment C

HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Senior Stock Clerk

Bargaining Unit: VMU

DEFINITION:

Under general supervision, a Senior Stock Clerk performs lead worker and maintenance support work related to requisitioning, receiving, inspecting, stocking and issuing of a variety of parts, equipment, tools, materials and supplies, including specialized items for facilities maintenance, custodial services, and vehicle maintenance activities; oversees the maintenance of appropriate inventory; performs record-keeping and other administrative support work; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Stock Clerk is the advanced-level class in the series. An incumbent in this class serves as a lead worker over subordinate Stock Clerks and also performs tasks requiring advanced knowledge of storekeeping methods as well as related departmental policies, practices, and procedures. This class may be distinguished from the lower-level class of Stock Clerk because an incumbent in the latter class performs the full scope of journey-level work and does not have formal lead worker responsibilities. It may also be distinguished from the higher-level class of Parts and Materials Supervisor as an incumbent in the latter class supervises the work of subordinate staff.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Serves as a lead worker over subordinate Stock Clerks by prioritizing, assigning and monitoring work and providing training as needed; may provide input on performance evaluations.
- Ensures the daily or regular inspection of the parts room and other locations, maintenance of accurate inventory counts, and placement of regular orders to stock items that are frequently requested or ordered in bulk.
- Leads and participates in the requisitioning, receiving, inspecting, stocking and issuing of a variety of materials and supplies requested by multiple departments, including specialized parts, equipment, and tools for facilities maintenance, custodial services, and vehicle maintenance activities.
- Monitors the “out of service” list and updates work orders to show status of orders; provides an estimated time of arrival.
- Assists departments in identifying the more difficult items to be purchased; researches catalogs, parts manuals, the Internet, and other sources; orders parts with vendors online, over the phone, or by submitting purchase requisitions according to METRO policies.
- Prepares budgetary estimates for parts, materials, and supplies.
- Contacts vendors to obtain pricing and availability quotations.
- Reviews vendor selection and performance regarding pricing, customer service, invoicing and returns/credits.
- Leads and participates in the receipt, inspection, and stocking of deliveries from suppliers; compares actual items received against orders to confirm completeness of delivery; delivers items to ordering departments; uses a forklift to unload/load large deliveries, handle and transport hazardous materials, and deliver larger items.



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- Ensures the maintenance and currency of Material Safety Data Sheet (MSDS) records, ensuring that items used or purchased are in the MSDS catalog; conducts a yearly MSDS inventory.
- Monitors accumulated metal, hazardous waste and other items and arranges pick-up for disposal.
- Packages and ships items needing repair or warranty work.
- Inspects forklifts and other equipment to verify safe operation.
- Loads and unloads items on and off armored cars as needed.
- Maintains the parts room in a clean and orderly fashion.
- Assists in vendor selection and monitors vendor performance.
- Performs data entry to update and maintain information in digital files; compiles and prepares data for statistical and accounting reports; may create spreadsheets and other tools to track information.
- May type correspondence and other documents.
- Answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machines; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Standard equipment, parts, tools and supplies required for maintaining light and heavy-duty vehicle systems, and their appropriate storage.
- Standard equipment, parts, and supplies required to maintain a wide variety of non-vehicular equipment and facilities, and their appropriate storage.
- Standard equipment, parts and supplies required for custodial work as well other general operational needs of a transit agency, and their appropriate storage.
- Principles and methods of maintaining a standard inventory of high demand items.
- Methods of determining the availability and best price for equipment, parts, tools, and supplies.
- Standard processes pertaining to purchasing and related data maintenance.
- Modern office practices, procedures, and equipment.
- Methods of maintaining information in digital or hard copy files.
- Clerical methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Serve as a lead worker over subordinate Stock Clerks and other clerical and support staff.



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- Lead and participate in the identification and procurement of a wide variety of tools, equipment, parts, supplies and other items requested by customers.
- Research the availability and price of requested items.
- Read and comprehend a variety of technical parts manuals, schematics, and safety-related documentation.
- Coordinate the maintenance of an adequate inventory of high-demand items and ensure their appropriate storage.
- Ensure a safe and organized work area.
- Ensure the safe handling of items hazardous in nature.
- Maintain detailed records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a forklift after receiving appropriate training.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Five (5) years of progressively responsible experience receiving, stocking, issuing and maintaining inventory of automotive and heavy-duty transit parts and supplies.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands



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While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop environment where the noise level may be loud and there is potential exposure to fumes, dust, grease, air contaminants, hazardous materials and chemicals.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Senior Transportation Planner

Bargaining Unit: SEA

DEFINITION:

Under direction, a Senior Transportation Planner performs advanced and specialized professional planning duties to support METRO transportation planning functions and processes; conducts the more complex transit planning and service delivery studies and identifies issues; obtains, organizes, analyzes and presents data for transportation-related studies; develops and recommends planning policies; prepares and presents oral and written planning reports; may serve as a lead worker over subordinate professional planning staff; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Transportation Planner is the advanced-level class in the series. An incumbent in this class performs tasks requiring advanced analysis, interpretation and application of specialized transportation planning laws, regulations, policies and procedures and typically serves as a lead worker over subordinate professional planning staff. This class may be distinguished from the lower-level class of Transportation Planner II because an incumbent in the latter class performs the full scope of journey-level professional planning work. This class may also be distinguished from the higher-level class of Transportation Planning Supervisor because the latter is the supervisory class in the series.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs difficult and complex transit planning and service delivery studies; develops work plans and budget estimates for studies; implements survey techniques and processes; collects and analyzes data and makes recommendations using transportation planning and statistical methods, modeling, and budgeting and financial analyses data; forecasts future transit, transportation, economic or demographic conditions and trends.
- Monitors current transit service levels and identifies potential areas for study; analyzes service delivery parameters such as boarding and alighting and safety concerns; analyzes technical, demographic, economic, and financial data used for assessing route and schedule changes and the development of service enhancements; conducts cost-benefit analyses on service enhancement proposals.
- Analyzes route and schedule performance to determine areas of transit service improvement in terms of efficiency, productivity and effectiveness; assists in planning numbers of stops, length of route and runs per shift for routes according to union/management procedures and cost per mile/hour; prepares written evaluations of proposed route, service, and schedule changes.
- Prepares complex planning reports, forecasts, and recommendations related to transportation system improvements; prepares statistical charts, maps, and other documents to accompany studies, reports and presentations; prepares ridership, on-time performance, productivity, and other route and service measurement reports for the General Manager, Board of Directors and others as requested.
- Develops, interprets, monitors and writes complex transit documents or proposed transportation policies; assists in the development of capital programs, grant applications for transportation



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funds, and the development of capital funding strategies; assists in the development of regional and jurisdictional service plans and cost proposals.

- Reviews and makes recommendations on development applications related to transportation service; provides documents and other information useful for evaluating development applications related to transportation service.
- Briefs members of the public and representatives of community organizations regarding pending and evaluations of and pending changes to routes and service changes as part of an outreach team.
- Responds orally and in writing to requests from the public, staff, governmental agencies, advisory committees and community groups for information regarding existing services and funding, suggested service adjustments and long-range planning issues.
- Performs GIS work including data manipulation/conversion, spatial and statistical analysis, map-making, documentation, technical support and application development.
- Prepares written and graphical information and may make oral presentations on transit and service related issues to the Board of Directors, staff, service users, governmental agencies, advisory committees and community groups.
- Functions as a project lead with other professional staff and consultants.
- May act as METRO's liaison with cities, other local/regional agencies and community groups regarding transportation issues.
- May serve as a lead worker over subordinate professional staff by prioritizing, assigning and monitoring their work and providing training as needed.
- Makes mathematical and statistical calculations; updates and maintains planning databases and directories.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced principles, concepts, goals and technical aspects of transportation planning and capital funding including traffic demand requirements.
- Applicable Federal, State and local laws governing transit operations, including funding programs and data reporting requirements.
- Physical, environmental, economic, aesthetic and social implications involved in transportation planning and transit-related development.
- Advanced principles of traffic demand management and measures of transit effectiveness used to assess route performance.
- Working knowledge of attractions and locations that generate transit patronage.
- Advanced professional methods of researching, gathering, organizing and reporting data.
- Advanced techniques for surveying and transmitting information.
- Advanced financial and statistical analysis methods.
- Advanced budgeting and financial analysis concepts and practices, including cost analysis and modeling.
- Community interrelationships.



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- Computer software common to the planning function (i.e., word processing, spreadsheet, modeling, mapping) at the intermediate level.
- Advanced project management methods and techniques.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Advanced customer service techniques.
- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Analyze complex issues and numerical measures associated with transportation planning projects, including estimates derived from computer models, engineering estimates of costs and benefits and public input.
- Develop difficult recommendations for immediate, short and long-range transportation service enhancements and capital requirements based on findings in studies, field observations and public contacts.
- Design and recommend complex transit service changes.
- Participate in a variety of transportation planning outreach activities and effectively advocate and promote the use of public transit.
- Read, analyze, understand and interpret complex scientific and technical journals, financial reports and legal documents.
- Conduct complex cost/benefit, impact and other related technical analyses.
- Formulate a response to inquiries or complaints from customers, regulatory agencies, local government representatives, citizen groups or members of the business community.
- Keep abreast of current trends in the field.
- Write letters, memorandums, board, planning and technical reports and fact sheets designed to be understood by all audiences, including the public.
- Design graphics/maps using computer/drawing software for publication studies.
- Prioritize projects based on established criteria.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Serve as a lead worker over subordinate technical, clerical and support staff.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.



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- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in urban or regional planning, urban studies, geography, Geographic Information Systems (GIS), public administration, political science, finance or a related field.

AND

Three (3) years of increasingly responsible professional experience performing transportation planning or transportation systems analysis for a public transportation system. Experience must have also included at least two (2) years of recent professional experience working with raw data files and ESRI GIS software to create and analyze spatial data, create high-quality maps, and develop GIS-based solutions/scheduling applications.

Master's degree is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Certification by the American Institute of Certified Planners (AICP)

OR

Possession of a Professional Transportation Planner (PTP) certificate is desirable.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:



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The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must participate in professional development activities.
- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.

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*Job Family: Professional Planning

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Senior Vehicle Service Worker

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Senior Vehicle Services Worker performs lead worker and unskilled vehicle and shop maintenance and service work; oversees the cleaning and maintenance of departmental equipment; coordinates and maintains a variety of service records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Vehicle Service Worker is the advanced-level class in the series. An incumbent in this class leads, coordinates and performs a variety of tasks to ensure that METRO vehicles and equipment provide a safe, clean, and efficient experience for passengers. This position may be distinguished from the lower-level class of Vehicle Service Worker II because an incumbent in the latter class performs journey-level work and does not have lead worker responsibilities.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Serves as a lead worker over subordinate staff by prioritizing, assigning and monitoring work and providing training as needed; may provide input on performance evaluations; maintains employee attendance records.
- Coordinates staff schedules and assignments.
- Cleans and maintains METRO vehicles and equipment.
- Washes vehicles and equipment.
- Operates automated bus washing equipment.
- Checks fuel, lubrication, coolant, and hydraulic system fluid levels and replenishes as necessary.
- Checks tire wear and inflation.
- Maintains proper service records, including all fuel, oil and hydraulic fluid used on equipment.
- Completes reports on all service work performed.
- Receives and reviews daily records on vehicle mechanical conditions.
- Performs general housekeeping duties in garage and equipment yard.
- Posts and removes internal advertising and notice materials from buses.
- Operates METRO vehicles as necessary.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee leadership, including ways to motivate staff and maximize productivity.
- Automotive maintenance nomenclature.
- Safe work practices.
- Proper use of lubricants and fuels.



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- Standard vehicle servicing procedures.
- Types and usage of cleaning products.
- Application and proper usage of cleaning tools, equipment, and supplies.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Serve as a lead worker over subordinate staff.
- Read, interpret and apply METRO policies, procedures and regulations.
- Understand and follow oral and written instructions.
- Use a variety of cleaning equipment, supplies, solvents and other chemicals safely in the performance of work.
- Follow established safety practices.
- Operate vehicle servicing equipment.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Three (3) years of progressively responsible experience servicing automotive, agricultural and/or construction equipment.

Previous lead worker experience is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Must be able to obtain a valid California Class B driver license is required.



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PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May be required to work a flexible schedule, including nights and/or weekends.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
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*Job Family: Maintenance



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Stock Clerk

Bargaining Unit: VMU

DEFINITION:

Under general supervision, a Stock Clerk performs skilled maintenance and clerical support duties related to requisitioning, receiving, inspecting, stocking and issuing of a variety of parts, equipment, tools, materials and supplies including specialized items for facilities maintenance, custodial services, and vehicle maintenance activities; assists departments in identifying the correct items to be purchased; performs periodic inventories and maintains appropriate stock levels of high volume items; may perform general office work; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Stock Clerk is the journey-level class in the series. An incumbent in this class performs tasks of average difficulty that require a basic knowledge of storekeeping and purchasing principles and methods as well as general departmental policies, practices, and procedures. This class may be distinguished from the higher-level class of Senior Stock Clerk because an incumbent in the latter class serves as a lead worker over subordinate Stock Clerks and may also perform more difficult work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Requisitions, receives, inspects, stocks and issues a variety of materials and supplies requested by multiple departments, including specialized parts, equipment, and tools for facilities maintenance, custodial services, and vehicle maintenance activities.
- Assists departments in identifying the correct items to be purchased by researching catalogs, parts manuals, the Internet, and other sources; orders parts with vendors online, over the phone, or by submitting purchase requisitions according to METRO policies; issues items to departments.
- Receives, inspects and stocks deliveries from suppliers; compares actual items received against orders to confirm completeness of delivery; delivers items to ordering departments; uses a forklift to unload/load large deliveries, handle and transport hazardous materials, and deliver larger items.
- Performs daily or regular inspections of the parts room and other locations as required; maintains accurate inventory counts and keeps records using a computerized inventory system; places regular orders to stock items that are frequently requested.
- Updates Material Safety Data Sheet (MSDS) records, ensuring that items used or purchased are in the MSDS catalog; conducts a yearly MSDS inventory.
- Monitors accumulated metal, hazardous waste and other items and notifies superior of need for disposal.
- Packages and ships items needing repair or warranty work.
- Inspects forklifts and other equipment to verify safe operation.
- Loads and unloads items on and off armored cars as needed.
- Maintains the parts room in a clean and orderly fashion.
- Assists in vendor selection and monitors vendor performance.



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- Performs data entry to update and maintain information in digital files; compiles and prepares data for statistical and accounting reports; may create spreadsheets and other tools to track information.
- May type correspondence and other documents.
- Answers telephones, greet visitors, and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Standard equipment, parts, tools and supplies required for maintaining light and heavy-duty vehicle systems, and their appropriate storage.
- Standard equipment, parts, and supplies required to maintain a wide variety of non-vehicular equipment and facilities, and their appropriate storage.
- Standard equipment, parts and supplies required for custodial work as well other general operational needs of a transit agency, and their appropriate storage.
- Principles and methods of maintaining a standard inventory of high demand items.
- Methods of determining the availability and best price for equipment, parts, tools, and supplies.
- Standard processes pertaining to purchasing and related data maintenance.
- Modern office practices, procedures, and equipment.
- Basic methods of maintaining information in digital or hard copy files.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Identify and procure a wide variety of tools, equipment, parts, supplies and other items requested by customers.
- Research the availability and price of requested items.
- Read and comprehend a variety of technical parts manuals, schematics, and safety-related documentation.
- Maintain an adequate inventory of high-demand items and ensure their appropriate storage.
- Maintain a safe and organized work area.
- Ensure the safe handling of items hazardous in nature.
- Follow oral and written instructions accurately.
- Maintain detailed records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.



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- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Drive a forklift after receiving appropriate training.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Two (2) years of progressively responsible experience receiving, stocking, issuing and maintaining inventory of automotive and heavy-duty transit parts and supplies.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop environment where the noise level may be loud and there is potential exposure to fumes, dust, grease, air contaminants, hazardous materials and chemicals.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.



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Santa Cruz METRO

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*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Systems Administrator I

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Systems Administrator I performs a limited range of professional information technology duties related to the design, development, administration, and maintenance of METRO computer systems; administers LINUX/UNIX and Windows based systems; analyzes and resolves system operation problems including those related to system security, user accounts, network functionality, and client-server hardware; and performs other duties as required.

DISTINGUISHING CHARACTERISTICS:

System Administrator I is the first working-level class in the series. An incumbent in this class performs a limited range of professional analytical technology duties while learning to perform the full scope of journey-level work. This class is distinguished from the Systems Administrator II class because an incumbent in the latter class performs the full range of journey-level professional systems administration work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Configures, supports, troubleshoots and administers server environments; ensures servers are patched as needed; restricts access control and monitors server performance; designs multiple solutions for remote access; develops scripts to automate tasks.
- Configures, supports, troubleshoots and administers virtualized environments and ensures they are patched, monitored, and load balanced for power usage; patches servers to the network via ethernet or fiber and organizes accordingly.
- Configures, supports, troubleshoots and administers the Windows Active Directory server; adds, removes and modifies permissions for users and for access control.
- Configures, supports, troubleshoots, and administers network and networking equipment including firewalls, routers, switches, and access points.; creates new subnets; patches networking equipment and terminates cabling; ensures connections are stable; plans and implements upgrades.
- Performs security analysis on an ongoing basis and recommends best practices for security; monitors and mitigates Internet attacks and configures firewall policies to strictly adhere to ongoing threats; creates monthly security bulletins to educate non-technical users to avoid phishing and social engineering attacks; ensures old insecure protocols are retired and replaced with modern secure protocols; configures and monitors intrusion prevention systems.
- Configures, supports, troubleshoots, and administers the telephony network including hardware, endpoints, and connections; adds, removes, or modifies extensions and configures telephony environment for best workflows; manages phone trees; ensures mission-critical phone lines work for customers to book rides and speak with customer service; configures and manages call center helpdesk queues; provides users with the most updated services available.



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

- Ensures backups are installed and running accurately; creates backup file systems and tests backups to ensure the quality of backup data; ensures scheduled backups are run and stored securely; plans for disaster recovery; plans and upgrades to modern network attached storage solutions.
- Deploys computers, network/telephone equipment, or troubleshoots onsite.
- Assists customer service with customer accounts; supports various third-party software tools in finance, purchasing, asset tracking, para-transit, telephony, and call center; assists with installation of self-hosted or third-party software.
- Provides desktop support via phone call, email, ticket, or walk in as required.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced computer hardware technology.
- Advanced network security, cryptography, encryption, secure data removal.
- Advanced networking (TCP-IP stack, OSI model, subnetting, switching, routing, wireless).
- Advanced anti-virus technologies.
- Advanced security protocols.
- Advanced Windows Operating systems.
- LINUX Operating systems.
- Citrix Desktop environment.
- VOIP
- Scripting such as Bash, Python, Powershell.
- Workplace safety issues related to the use of computers.
- Remote access technologies.

Ability to:

- Analyze system architecture and design, recommend and implement improvements based on new technologies.
- Work independently to analyze hardware and software problems related to the design and maintenance of computer systems.
- Read and interpret complex technical manuals, procedures, and instructions.
- Clearly and effectively present complex technical information to both technical and non-technical users.
- Analyze and maintain complex computer and networking equipment.
- Install hardware, software, and system upgrades.
- Write user instructions and procedures.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.



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HUMAN RESOURCES DEPARTMENT

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- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in computer science or a related field.

AND

Two (2) years of professional experience designing and maintaining network and server systems in a Windows, LINUX/UNIX or a similar operating system environment.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.

*Adopted: 00-00-00



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*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Information Technology Professional

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Systems Administrator II

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Systems Administrator II performs journey-level professional information technology duties related to the design, development, administration, and maintenance of METRO computer systems; administers LINUX/UNIX and Windows based systems; analyzes and resolves system operation problems including those related to system security, user accounts, network functionality, and client-server hardware; and performs other duties as required.

DISTINGUISHING CHARACTERISTICS:

System Administrator II is the journey-level class in the series. An incumbent in this class performs the full range of journey-level professional analytical technology duties. This class is distinguished from the Systems Administrator I class because an incumbent in the latter class performs a limited range of professional systems administration work while learning to perform the full-range of journey-level duties.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Configures, supports, troubleshoots and administers server environments; ensures servers are patched as needed; restricts access control and monitors server performance; designs multiple solutions for remote access; develops scripts to automate tasks.
- Configures, supports, troubleshoots and administers virtualized environments and ensures they are patched, monitored, and load balanced for power usage; patches servers to the network via ethernet or fiber and organizes accordingly.
- Configures, supports, troubleshoots and administers the Windows Active Directory server; adds, removes and modifies permissions for users and for access control.
- Configures, supports, troubleshoots, and administers network and networking equipment including firewalls, routers, switches, and access points.; creates new subnets; patches networking equipment and terminates cabling; ensures connections are stable; plans and implements upgrades.
- Performs security analysis on an ongoing basis and recommends best practices for security; monitors and mitigates Internet attacks and configures firewall policies to strictly adhere to ongoing threats; creates monthly security bulletins to educate non-technical users to avoid phishing and social engineering attacks; ensures old insecure protocols are retired and replaced with modern secure protocols; configures and monitors intrusion prevention systems.
- Configures, supports, troubleshoots, and administers the telephony network including hardware, endpoints, and connections; adds, removes, or modifies extensions and configures telephony environment for best workflows; manages phone trees; ensures mission-critical phone lines work for customers to book rides and speak with customer service; configures and manages call center helpdesk queues; provides users with the most updated services available.
- Ensures backups are installed and running accurately; creates backup file systems and tests backups to ensure the quality of backup data; ensures scheduled backups are run and stored



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securely; plans for disaster recovery; plans and upgrades to modern network attached storage solutions.

- Deploys computers, network/telephone equipment, or troubleshoots onsite.
- Assists customer service with customer accounts; supports various third-party software tools in finance, purchasing, asset tracking, para-transit, telephony, and call center; assists with installation of self-hosted or third-party software.
- Provides desktop support via phone call, email, ticket, or walk in as required.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Advanced computer hardware technology.
- Advanced network security, cryptography, encryption, secure data removal.
- Advanced networking (TCP-IP stack, OSI model, subnetting, switching, routing, wireless).
- Advanced anti-virus technologies.
- Advanced security protocols.
- Advanced Windows Operating systems.
- LINUX Operating systems.
- Citrix Desktop environment.
- VOIP
- Scripting such as Bash, Python, Powershell.
- Workplace safety issues related to the use of computers.
- Remote access technologies.

Ability to:

- Analyze system architecture and design, recommend and implement improvements based on new technologies.
- Work independently to analyze hardware and software problems related to the design and maintenance of computer systems.
- Read and interpret complex technical manuals, procedures, and instructions.
- Clearly and effectively present complex technical information to both technical and non-technical users.
- Analyze and maintain complex computer and networking equipment.
- Install hardware, software, and system upgrades.
- Write user instructions and procedures.
- Adhere to established work schedules and timelines.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in computer science or a related field.

AND

Two (2) years of professional experience designing and maintaining network and server systems in a Windows, LINUX/UNIX or a similar operating system environment.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must maintain strict confidentiality of work-related information.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Information Technology Professional



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Ticket and Pass Program Specialist

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Ticket and Pass Program Specialist performs bookkeeping, record-keeping and general support duties for METRO's Ticket and Pass Sales Program; distributes METRO tickets and passes to agents/vendors; maintains detailed records pertaining to ticket and pass sales in computerized and hard copy files; verifies cash receipts and prepares bank deposits; orders supplies and maintains ticket/pass stock; gathers and compiles data for statistical or financial reports; provides information to employees and the public; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Ticket and Pass Program Specialist is a journey-level clerical and program support class. An incumbent in this class performs clerical accounting tasks of average difficulty requiring a basic knowledge of bookkeeping principles and methods as well as general departmental policies, practices, and procedures. An incumbent in this class also works with agents and vendors to coordinate day-to-day program operations and to encourage public participation in the program.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs clerical accounting, bookkeeping, record-keeping and general support functions for METRO's Ticket and Pass Sales Program.
- Communicates with ticket agents and vendors to determine the need for METRO tickets and passes and to encourage participation in the program; delivers tickets and passes; records information on past sales and new ticket and pass deliveries; delivers regular orders of tickets and passes to the METRO information booth; may process large quantities of tickets and passes if requested by customers.
- Maintains various records and information in manual and automated files related to ticket and pass sales including sales reports, deposit slips, receipts, invoices, field trip forms, complimentary passes, and other documents; compiles data and prepares reports on sales revenue, cash receipts, and other program activities; develops new or ad hoc reports as requested by management.
- Prepares deposit slips and makes bank deposits according to established protocols.
- Monitors Ticket Vending Machine (TVM) sales; contacts maintenance as needed to repair machines; meets with security staff on a regular basis to retrieve revenues from TVM's and refill machines with change; counts and deposits TVM revenues; orders change to refill machines; updates program records with revenue information.
- Responds to ticket and pass requests received through Internet sales; prepares and mails orders; updates customer information on the METRO website; assists customers with establishing METRO website accounts.
- Provides program information and orientation to potential and new ticket agents and vendors on how the program works and their role in selling tickets and passes; solicits new potential agents; provides agents with marketing materials.
- Develops procedures for own work.



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- Communicates with outside contractors during periodic audits.
- Maintains inventories and orders supplies.
- Types memoranda, letters, reports, contracts, purchase orders, statistical data, specifications, and other documents as directed.
- Answers telephones and provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to pick up or deliver materials, correspondence or documents.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Basic bookkeeping methods.
- Basic clerical processes pertaining to accounting, purchasing, and data maintenance.
- Modern office practices, procedures, and equipment.
- Basic methods of maintaining information in digital or hard copy files.
- Basic clerical methods of researching, gathering, organizing and reporting data.
- Basic methods of prioritizing, planning and organizing work.
- Basic time management techniques.
- Basic clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.

Ability to:

- Perform clerical accounting, bookkeeping, record-keeping, and field work with substantial independence, good judgment, and discretion.
- Follow oral and written instructions accurately.
- Devise and adapt work procedures to meet changing needs.
- Understand the relationship between account records and documents for recording and reporting purposes.
- Perform routine reconciliations within a record-keeping system.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Type correspondence and routine documents.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.



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MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Two (2) years of clerical accounting, bookkeeping or financial record-keeping experience.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is often required to reach with hands and arms; walk and sit; use finger dexterity; and talk and hear. Work often requires the repetitive use of both hands to grasp and feel objects and use a keyboard. The employee is regularly required to stoop at the waist, kneel, crouch, and stand. Occasional lifting up to 25 pounds unaided may be required. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; uses basic math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a standard office environment where the noise level is usually moderate. May work out in the field when needed.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00

*BOD Approved: 00-00-00

*Revised: 00-00-00

*Job Family: Financial Administrative Support



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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Transit Supervisor

Bargaining Unit: PSA

DEFINITION:

Under direction, a Transit Supervisor performs supervisory and transit operations work related to directing and coordinating the daily operation of METRO's bus fleet; schedules and dispatches Bus Operators; ensures that assigned operations comply with applicable laws, regulations, policies, and procedures; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Transit Supervisor is a supervisory transit operations classification. In addition to required supervisory duties, an incumbent in this class primarily performs either Bus Operator field dispatching or scheduling. However, an incumbent will also be cross-trained to ensure adequate coverage across all areas and must, therefore, be able to perform the full range of class functions.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Supervises subordinate staff; assigns, directs, schedules, and monitors work; provides staff training; evaluates employee performance; counsels subordinate staff; initiates or has significant input into disciplinary actions; may testify in disciplinary hearings.
- Participates in the recruitment, selection, and on-boarding process of new departmental employees.
- Performs a variety of timekeeping duties; reviews and approves or disapproves overtime and time off; records time off requests in compliance with labor agreement(s); tracks attendance and monitors attendance incentive records; prepares daily extra-board schedule; completes related paperwork for all Operations Yards; coordinates various timekeeping functions with operations departments.
- Establishes and maintains timekeeping-related data, records, and documents, including but not limited to, annual leave calendar, sick calls and general leave of absence calendar in accordance with applicable labor contract(s); notifies Bus Operators of changes as required.
- Responds to issues in the field, including but not limited to, farebox issues, mechanical problems, route delays, passenger problems, and unusual or emergency situations both on buses or at bus stops.
- Assists in investigating accidents and incidents on METRO buses and property; completes required paperwork and reports; identifies causes of accidents and recommends the follow up action, if needed.
- Schedules random, reasonable suspicion, and post-accident drug and alcohol testing of Bus Operators in compliance with Department of Transportation (DOT) and Federal Transit Administration (FTA) regulations.
- Receives and investigates complaints, completes required paperwork, and recommends the follow up action, as appropriate.



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- Monitors two-way radio system and in-field operations, ensuring compliance with Federal and State regulations and METRO operating procedures; communicates with maintenance and other departments as needed; operates the base radio station and directs operators over the radio as necessary; dispatches road supervisory personnel.
- Prepares daily coach and operator schedules; prepares operator paddles and other materials; performs in-field bus exchanges and transports Bus Operators when needed; replaces Operators as necessary; assigns buses and replacement buses as needed.
- Coordinates scheduling with a variety of agencies, including Caltrans and law enforcement, to work around detours related to emergencies, construction, special events, or other situations.
- Adds or drops individual runs based on available resources, ensuring compliance with applicable labor contract provisions.
- May assist in planning and evaluating routes, route extensions, deletions, schedule time points, and other system modifications.
- Participates in the quarterly bid process as assigned.
- May testify in court and represent METRO in court appearances as directed.
- Performs data entry to update and maintain information in digital files; compiles and prepares data for statistical and accounting reports; may create spreadsheets and other tools to track information; types correspondence and other documents; provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Attends a variety of meetings as directed.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Applicable Federal, State, and local laws and regulations pertaining to the area of assignment, including State Vehicle Codes as well as Cal-OSHA, DOT and FTA regulations.
- METRO labor contracts.
- Local and regional transportation services.
- Principles and practices of effective transit bus operations.
- Modern office practices, procedures, and equipment.
- Methods of maintaining information in digital or hard copy files.
- Methods of researching, gathering, organizing and reporting data.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Clerical customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Telephone techniques and etiquette.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and standard business software.



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Ability to:

- Supervise and motivate subordinate staff effectively.
- Interpret, explain, and ensure compliance with relevant laws, policies, regulations, and requirements.
- Learn radio procedures and operate a base radio station.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Maintain a calm demeanor in stressful situations.
- Work independently using good judgment, tact, and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Two (2) years of progressively responsible experience as a Transit Bus Operator with Santa Cruz Metro.

OR

Three (3) years of progressively responsible experience as a public transit bus operator.

AND

Previous experience serving as a lead worker is desirable.

LICENSES AND CERTIFICATES:

A valid California Class B driver license with passenger endorsement and safe driving record are required at the time of appointment and throughout employment.

SPECIAL REQUIREMENTS:

- Driving record will be reviewed as part of the application process.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands



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While performing the duties of this job, the employee is regularly required to sit, walk, climb and stand; talk and hear; use hands to manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck and occasionally reach overhead. Work may require lifting up to 50 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in an office environment where the noise level is usually moderate. The employee occasionally works in a field environment with potential exposure to varied weather conditions, dust, fumes, and hazardous materials and where the noise level is loud.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Required to be able to respond to emergency situations seven days per week, 24 hours per day.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Transit Operations



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HUMAN RESOURCES DEPARTMENT

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Class Code: Class Code
FLSA Status: Pending

Transportation Planner I

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Transportation Planner I performs a limited range of professional planning duties in support of METRO transportation planning functions and processes; conducts transit planning and service delivery studies and identifies issues; obtains, organizes, analyzes and presents data for transportation-related studies; participates in planning policy development; assists in the preparation and presentation of oral and written reports; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Transportation Planner I is the entry-level class in the series. An incumbent in this class performs tasks requiring a general interpretation and application of specialized transportation planning laws, regulations, policies and procedures. This class may be distinguished from the higher-level class of Transportation Planner II because an incumbent in the latter class performs the full scope of journey-level professional planning work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs a limited range of professional planning duties in support of METRO transportation planning functions and processes while learning to perform the full scope of journey-level professional work.
- Performs a variety of transit planning and service delivery studies; develops work plans and budget estimates for studies; implements survey techniques and processes; collects and analyzes data and makes recommendations using transportation planning and statistical methods, modeling, and budgeting and financial analyses data; forecasts future transit, transportation, economic or demographic conditions and trends.
- Monitors current transit service levels and identifies potential areas for study; analyzes service delivery parameters such as boarding and alighting and safety concerns; analyzes technical, demographic, economic, and financial data used for assessing route and schedule changes and the development of service enhancements; conducts cost-benefit analyses on service enhancement proposals.
- Analyzes route and schedule performance to determine areas for transit service improvement in terms of efficiency, productivity and effectiveness; assists in planning numbers of stops, length of route and runs per shift for routes according to union/management procedures and cost per mile/hour; prepares written evaluations of proposed route, service, and schedule changes.
- Prepares planning reports, forecasts, and recommendations related to transportation system improvements; prepares statistical charts, maps, and other documents to accompany studies, reports and presentations; prepares ridership, on-time performance, productivity, and other route and service measurement reports for the General Manager, Board of Directors and others as requested.
- Develops, interprets, monitors and writes transit documents or proposed transportation policies; assists in the development of capital programs, grant applications for transportation funds, and



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the development of capital funding strategies; assists in the development of regional and jurisdictional service plans and cost proposals.

- Reviews and makes recommendations on development applications related to transportation service; provides documents and other information useful for evaluating development applications related to transportation service.
- As part of an outreach team, briefs members of the public and representatives of community organizations regarding pending and evaluations of and pending changes to routes and service changes as part of an outreach team.
- Responds orally and in writing to requests from the public, staff, governmental agencies, advisory committees and community groups for information regarding existing services and funding, suggested service adjustments and long-range planning issues.
- Performs GIS work including data manipulation/conversion, spatial and statistical analysis, map-making, documentation, technical support and application development.
- Prepares written and graphical information and may make oral presentations on transit and service related issues to the Board of Directors, staff, service users, governmental agencies, advisory committees and community groups.
- May function as a project lead with other professional staff and consultants.
- May act as METRO's liaison with cities, other local/regional agencies and community groups regarding transportation issues.
- Makes mathematical and statistical calculations; updates and maintains planning databases and directories.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, concepts, goals and technical aspects of transportation planning and capital funding including traffic demand requirements.
- Applicable Federal, State and local laws governing transit operations, including funding programs and data reporting requirements.
- Physical, environmental, economic, aesthetic and social implications involved in transportation planning and transit-related development.
- Principles of traffic demand management and measures of transit effectiveness used to assess route performance.
- Working knowledge of attractions and locations that generate transit patronage.
- Professional methods of researching, gathering, organizing and reporting data.
- Techniques for surveying and transmitting information.
- Financial and statistical analysis methods.
- Budgeting and financial analysis concepts and practices, including cost analysis and modeling.
- Community interrelationships.
- Computer software common to the planning function (i.e., word processing, spreadsheet, modeling, mapping) at the intermediate level.
- Project management methods and techniques.



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- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Analyze issues and numerical measures associated with transportation planning projects, including estimates derived from computer models, engineering estimates of costs and benefits and public input.
- Develop recommendations for immediate, short-, and long-range transportation service enhancements and capital requirements based on findings in studies, field observations and public contacts.
- Design and recommend transit service changes.
- Participate in a variety of transportation planning outreach activities and effectively advocate and promote the use of public transit.
- Read, analyze, understand and interpret complex scientific and technical journals, financial reports and legal documents.
- Conduct cost/benefit, impact and other related technical analyses.
- Formulate a response to inquiries or complaints from customers, regulatory agencies, local government representatives, citizen groups or members of the business community.
- Keep abreast of current trends in the field.
- Write letters, memoranda, board, planning and technical reports and fact sheets designed to be understood by all audiences, including the general public.
- Design graphics/maps using computer/drawing software for publication studies.
- Prioritize projects based on established criteria.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.



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MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in urban or regional planning, urban studies, geography, Geographic Information Systems (GIS), public administration, political science, finance or a related field.

AND

Recent experience working with raw data files and ESRI GIS software to create and analyze spatial data, create high-quality maps, and develop GIS-based solutions/scheduling applications is desirable.

Master's degree is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Certification by the American Institute of Certified Planners (AICP) or
OR

Possession of a Professional Transportation Planner (PTP) certificate is desirable.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must participate in professional development activities.



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- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Planning Professional

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Transportation Planner II

Bargaining Unit: SEA

DEFINITION:

Under direction, a Transportation Planner II performs the full range of journey-level professional planning duties in support of METRO transportation planning functions and processes; conducts transit planning and service delivery studies and identifies issues; obtains, organizes, analyzes and presents data for transportation-related studies; participates in planning policy development; prepares and presents oral and written reports; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Transportation Planner II is the journey-level class in the professional planning series. An incumbent in this class performs professional planning tasks requiring analysis, interpretation and application of specialized transportation planning laws, regulations, policies and procedures. This class may be distinguished from the lower-level class of Transportation Planner I because an incumbent in the latter class performs a limited range of duties while learning to perform the full scope of journey-level professional planning work. This class can also be distinguished from the higher-level class of Senior Transportation Planner because an incumbent in the latter class performs advanced and specialized professional planning work and typically serves as a lead worker over subordinate professional staff.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs the full scope of journey-level, professional planning duties in support of METRO transportation planning functions and processes.
- Performs a variety of transit planning and service delivery studies; develops work plans and budget estimates for studies; implements survey techniques and processes; collects and analyzes data and makes recommendations using transportation planning and statistical methods, modeling, and budgeting and financial analyses data; forecasts future transit, transportation, economic or demographic conditions and trends.
- Monitors current transit service levels and identifies potential areas for study; analyzes service delivery parameters such as boarding and alighting and safety concerns; analyzes technical, demographic, economic, and financial data used for assessing route and schedule changes and the development of service enhancements; conducts cost-benefit analyses on service enhancement proposals.
- Analyzes route and schedule performance to determine areas for transit service improvement in terms of efficiency, productivity and effectiveness; assists in planning numbers of stops, length of route and runs per shift for routes according to union/management procedures and cost per mile/hour; prepares written evaluations of proposed route, service, and schedule changes.
- Prepares planning reports, forecasts, and recommendations related to transportation system improvements; prepares statistical charts, maps, and other documents to accompany studies, reports and presentations; prepares ridership, on-time performance, productivity, and other route and service measurement reports for the General Manager, Board of Directors and others as requested.



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- Develops, interprets, monitors and writes transit documents or proposed transportation policies; assists in the development of capital programs, grant applications for transportation funds, and the development of capital funding strategies; assists in the development of regional and jurisdictional service plans and cost proposals.
- Reviews and makes recommendations on development applications related to transportation service; provides documents and other information useful for evaluating development applications related to transportation service.
- Briefs members of the public and representatives of community organizations regarding pending changes to routes and service changes as part of an outreach team.
- Responds orally and in writing to requests from the public, staff, governmental agencies, advisory committees and community groups for information regarding existing services and funding, suggested service adjustments and long-range planning issues.
- Performs GIS work including data manipulation/conversion, spatial and statistical analysis, map-making, documentation, technical support and application development.
- Prepares written and graphical information and may make oral presentations on transit and service related issues to the Board of Directors, staff, service users, governmental agencies, advisory committees and community groups.
- May function as a project lead with other professional staff and consultants.
- May act as METRO's liaison with cities, other local/regional agencies and community groups regarding transportation issues.
- Makes mathematical and statistical calculations; updates and maintains planning databases and directories.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles, concepts, goals and technical aspects of transportation planning and capital funding including traffic demand requirements.
- Applicable Federal, State and local laws governing transit operations, including funding programs and data reporting requirements.
- Physical, environmental, economic, aesthetic and social implications involved in transportation planning and transit-related development.
- Principles of traffic demand management and measures of transit effectiveness used to assess route performance.
- Working knowledge of attractions and locations that generate transit patronage.
- Professional methods of researching, gathering, organizing and reporting data.
- Techniques for surveying and transmitting information.
- Financial and statistical analysis methods.
- Budgeting and financial analysis concepts and practices, including cost analysis and modeling.
- Community interrelationships.
- Computer software common to the planning function (i.e., word processing, spreadsheet, modeling, mapping) at the intermediate level.



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- Project management methods and techniques.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Analyze issues and numerical measures associated with transportation planning projects, including estimates derived from computer models, engineering estimates of costs and benefits and public input.
- Develop recommendations for immediate, short, and long-range transportation service enhancements and capital requirements based on findings in studies, field observations and public contacts.
- Design and recommend transit service changes.
- Participate in a variety of transportation planning outreach activities and effectively advocate and promote the use of public transit.
- Read, analyze, understand and interpret complex scientific and technical journals, financial reports and legal documents.
- Conduct cost/benefit, impact and other related technical analyses.
- Formulate a response to inquiries or complaints from customers, regulatory agencies, local government representatives, citizen groups or members of the business community.
- Keep abreast of current trends in the field.
- Write letters, memoranda, board, planning and technical reports and fact sheets designed to be understood by all audiences, including the public.
- Design graphics/maps using computer/drawing software for publication studies.
- Prioritize projects based on established criteria.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.



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MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in urban or regional planning, urban studies, geography, Geographic Information Systems (GIS), public administration, political science, finance or a related field.

AND

Three (3) years of increasingly responsible professional experience performing transportation planning or transportation systems analysis for a public transportation system. Experience must have also included at least two (2) years of recent professional experience working with raw data files and ESRI GIS software to create and analyze spatial data, create high-quality maps, and develop GIS-based solutions/scheduling applications.

Master's degree is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Certification by the American Institute of Certified Planners (AICP)

OR

Possession of a Professional Transportation Planner (PTP) certificate is desirable.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee typically works in a standard office environment where the noise level is moderate.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must participate in professional development activities.
- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Planning Professional

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HUMAN RESOURCES DEPARTMENT

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Class Code: Class Code
FLSA Status: Pending

Transportation Planning Supervisor

Bargaining Unit: PSA

DEFINITION:

Under general direction, a Transportation Planning Supervisor performs supervisory and advanced professional planning duties to support METRO transportation planning functions and processes; supervises the implementation of transit planning and service delivery studies and the identification of issues; directs and supervises the gathering, organizing, analysis and presentation of data for transportation-related studies; develops and recommends planning policies; directs and supervises the preparation and presentation of oral and written planning reports; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Senior Transportation Planner is the supervisory-level class in the series. An incumbent in this class supervises and performs tasks requiring analysis, interpretation and application of specialized transportation planning laws, regulations, policies and procedures. This class may be distinguished from the lower-level class of Senior Transportation Planner because an incumbent in the latter class performs advanced and specialized professional planning work and typically serves as a lead worker over subordinate professional staff.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Supervises subordinate professional planning staff and may supervise technical, clerical or support staff; assigns, directs, and monitors work; provides staff training; evaluates employee performance; may participate in staff selection; may initiate or have significant input into disciplinary actions.
- Performs difficult and complex transit planning and service delivery studies; develops work plans and budget estimates for studies; implements survey techniques and processes; collects and analyzes data and makes recommendations using transportation planning and statistical methods, modeling, and budgeting and financial analyses data; forecasts future transit, transportation, economic or demographic conditions and trends.
- Monitors current transit service levels and identifies potential areas for study; analyzes service delivery parameters such as boarding and alighting and safety concerns; analyzes technical, demographic, economic, and financial data used for assessing route and schedule changes and the development of service enhancements; conducts cost-benefit analyses on service enhancement proposals.
- Analyzes route and schedule performance to determine areas of transit service improvement in terms of efficiency, productivity and effectiveness; assists in planning numbers of stops, length of route and runs per shift for routes according to union/management procedures and cost per mile/hour; prepares written evaluations of proposed route, service, and schedule changes.
- Prepares complex planning reports, forecasts, and recommendations related to transportation system improvements; prepares statistical charts, maps, and other documents to accompany studies, reports and presentations; prepares ridership, on-time performance, productivity, and



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other route and service measurement reports for the General Manager, Board of Directors and others as requested.

- Develops, interprets, monitors and writes complex transit documents or proposed transportation policies; assists in the development of capital programs, grant applications for transportation funds, and the development of capital funding strategies; assists in the development of regional and jurisdictional service plans and cost proposals.
- Reviews and makes recommendations on development applications related to transportation service; provides documents and other information useful for evaluating development applications related to transportation service.
- Briefs members of the public and representatives of community organizations regarding pending and evaluations of and pending changes to routes and service changes as part of an outreach team.
- Responds orally and in writing to requests from the public, staff, governmental agencies, advisory committees and community groups for information regarding existing services and funding, suggested service adjustments and long-range planning issues.
- Performs GIS work including data manipulation/conversion, spatial and statistical analysis, map-making, documentation, technical support and application development.
- Prepares written and graphical information and may make oral presentations on transit and service related issues to the Board of Directors, staff, service users, governmental agencies, advisory committees and community groups.
- Functions as a project lead with other professional staff and consultants.
- May act as METRO's liaison with cities, other local/regional agencies and community groups regarding transportation issues.
- Makes mathematical and statistical calculations; updates and maintains planning databases and directories.
- Provides information to employees and the public.
- Operates standard office equipment including a computer, typewriter, photocopy machine, fax, and photo identification equipment; utilizes METRO computer software in performing job tasks.
- May drive a METRO vehicle to perform work assignments.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of employee supervision, including performance evaluation and progressive discipline.
- Advanced principles, concepts, goals and technical aspects of transportation planning and capital funding including traffic demand requirements.
- Applicable Federal, State and local laws governing transit operations, including funding programs and data reporting requirements.
- Physical, environmental, economic, aesthetic and social implications involved in transportation planning and transit-related development.
- Advanced principles of traffic demand management and measures of transit effectiveness used to assess route performance.
- Attractions and locations that generate transit patronage.
- Advanced professional methods of researching, gathering, organizing and reporting data.
- Advanced techniques for surveying and transmitting information.



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- Advanced financial and statistical analysis methods.
- Advanced budgeting and financial analysis concepts and practices, including cost analysis and modeling.
- Community interrelationships.
- Computer software common to the planning function (i.e., word processing, spreadsheet, modeling, mapping) at the intermediate level.
- Advanced project management methods and techniques.
- Modern office practices, procedures and equipment.
- Business correspondence, formatting and report writing.
- Manual and automated record-keeping and filing systems.
- Advanced methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Advanced time management techniques.
- Advanced customer service techniques.
- Intermediate mathematics including addition, subtraction, multiplication, division, percentages and basic statistics.
- Correct English usage, grammar, spelling, punctuation and vocabulary.
- The effective use of modern office equipment, personal computers and standard business software.

Ability to:

- Effectively supervise and motivate subordinate staff.
- Analyze complex issues and numerical measures associated with transportation planning projects, including estimates derived from computer models, engineering estimates of costs and benefits and public input.
- Develop difficult recommendations for immediate, short-, and long-range transportation service enhancements and capital requirements based on findings in studies, field observations and public contacts.
- Design and recommend complex transit service changes.
- Participate in a variety of transportation planning outreach activities and effectively advocate and promote the use of public transit.
- Read, analyze, understand and interpret complex scientific and technical journals, financial reports and legal documents.
- Conduct complex cost/benefit, impact and other related technical analyses.
- Formulate a response to inquiries or complaints from customers, regulatory agencies, local government representatives, citizen groups or members of the business community.
- Keep abreast of current trends in the field.
- Write letters, memorandums, board, planning and technical reports and fact sheets designed to be understood by all audiences, including the public.
- Design graphics/maps using computer/drawing software for publication studies.
- Prioritize projects based on established criteria.
- Adhere to established work schedules and timelines.
- Work independently using good judgment, tact and discretion.
- Balance multiple assignments simultaneously and effectively.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Maintain confidentiality of materials, records, files and other privileged information.



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- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Bachelor's degree from an accredited college or university with major coursework in urban or regional planning, urban studies, geography, Geographic Information Systems (GIS), public administration, political science, finance or a related field.

AND

Six (6) years of increasingly responsible professional experience performing transportation planning or transportation systems analysis for a public transportation system. Experience must have also included at least three (3) years of recent professional experience working with raw data files and ESRI GIS software to create and analyze spatial data, create high-quality maps, and develop GIS-based solutions/scheduling applications.

Master's degree is desirable.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Certification by the American Institute of Certified Planners (AICP)

OR

Possession of a Professional Transportation Planner (PTP) certificate is desirable.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires stooping at the waist and the repetitive use of both hands to grasp and feel objects. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; solves problems; uses math and mathematical reasoning; performs detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:



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The employee typically works in a standard office environment where the noise level is moderate.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must participate in professional development activities.
- May occasionally require working extended hours or hours outside of regular schedule.
- May require occasional travel.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Professional Planning

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Upholsterer I

Bargaining Unit: VMU

DEFINITION:

Under general direction, an Upholsterer I performs a limited range of skilled duties related to upholstery and minor structural repairs for METRO vehicles while learning to perform the full-scope of journey-level work; repairs seat cushions, backrests, and flooring; assists with minor vehicle body and framework repairs; replaces and repairs windows and glass; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Upholsterer I is the first working-level class in the series. An incumbent in this class performs a limited range of skilled tasks to ensure that vehicle upholstery and other structural vehicle components are safe and comfortable for passengers and operators. This position is distinguished from the higher-level class of Upholsterer II because an incumbent in the latter class performs the full scope of journey-level upholstery work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs a limited range of skilled tasks in the maintenance of and repairs to the upholstery of buses, METRO equipment, and vehicles while learning to perform the full scope of journey-level work.
- Operates power sewing machine and other related upholstery equipment and tools.
- Drafts patterns for seat cushions, backrests, and flooring.
- Cuts and installs upholstery for seats and backrests.
- Sews, fastens and welts upholstery materials for METRO vehicles.
- Repairs and replaces seat springs and cushions.
- Constructs, rebuilds and/or repairs seat assemblies for METRO vehicles and equipment.
- Makes minor body repairs including: removing, disassembling, straightening, repairing, fitting, and replacing damaged body panels and other major component parts or systems; Repairing body dents or scratches and preparing for painting; Repairing or replacing damaged windows, mirrors, glass or laminates; Repairing, replacing and maintaining interior flooring, side and ceiling panels.
- Assists with final preparation and detailing of METRO vehicles.
- Monitors the interior condition of vehicles and equipment and recommends repairs as needed.
- Recommends the purchase of tools, supplies, materials, and equipment needed for upholstery, body and glass repairs.
- Assists with maintaining an inventory of parts and tools for the upholstery shop.
- Maintains clean a working area.
- Maintains METRO property, tools and equipment provided.
- Performs pickup and delivery functions to satellite facilities.
- May assist with emergency road service calls and operate buses for maintenance purposes.
- Maintains written records of repairs on work orders.
- May provide work coordination and training for Upholsterer I incumbents, as assigned.



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- Operates a personal computer and standard business software.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Basic principles and practices of upholstery.
- Basic upholstery cleaning methods and supplies.
- Basic methods and materials used in the construction and repair of seat covers and backrests as well as the reconstruction and repair of seat assemblies, including springs, electrical, pneumatic/hydraulic and mechanical seat assemblies.
- Operation of a power sewing machine and related equipment, as well as hand tools used in the upholstery trade.
- Basic pattern drafting.
- General shop safety procedures, including the use of trade tools and personal safety equipment.
- Methods of performing routine automotive body repairs including spot painting.
- Occupational Safety and Health Standards applicable to bodywork and painting.
- Hazardous materials handling, disposal and safety practices.
- Methods of maintaining information in computerized or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Operate a power sewing machine and other tools and equipment used in the repair and maintenance of METRO vehicles.
- Read and understand technical information.
- Read, interpret and apply pattern instructions to measure, cut and sew padding and material accurately.
- Perform basic upholstery work using a variety of materials, including cloth, vinyl, canvas, and leather.
- Estimate material and labor costs.
- Reconstruct and repair seat assemblies.
- Perform minor vehicle body repairs.
- Operate a variety of vehicles and equipment, including forklifts, pallet jacks, and utility vehicles.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.



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Santa Cruz METRO

- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

One (1) year of progressively responsible experience in vehicle upholstery.

OR

Completion of an upholstery apprenticeship program.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

The ability to obtain a valid California Class B driver's license is required.

SPECIAL REQUIREMENTS:

- Possession of, or ability to obtain, the tools necessary to perform the duties of the position.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance

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HUMAN RESOURCES DEPARTMENT

Santa Cruz METRO

Class Code: Class Code
FLSA Status: Pending

Upholsterer II

Bargaining Unit: VMU

DEFINITION:

Under general direction, an Upholsterer II performs skilled work related to upholstery and minor structural repairs for METRO vehicles; repairs seat cushions, backrests, and flooring; assists with minor vehicle body and framework repairs; replaces and repairs windows and glass; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Upholsterer II is the journey-level class in the series. An incumbent in this class performs a variety of skilled tasks to ensure that vehicle upholstery and other structural vehicle components are safe and comfortable for passengers and operators. This position is distinguished from the lower-level class of Upholsterer I because an incumbent in the latter class performs a limited range of duties while learning to perform the full scope of journey-level upholstery work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs a variety of skilled tasks in the maintenance of and repairs to the upholstery of buses, METRO equipment, and vehicles.
- Operates power sewing machine and other related upholstery equipment and tools.
- Drafts patterns for seat cushions, backrests, and flooring.
- Cuts and installs upholstery for seats and backrests.
- Sews, fastens and welts upholstery materials for METRO vehicles.
- Repairs and replaces seat springs and cushions.
- Constructs, rebuilds and/or repairs seat assemblies for METRO vehicles and equipment.
- Makes minor body repairs including: removing, disassembling, straightening, repairing, fitting, and replacing damaged body panels and other major component parts or systems.; Repairing body dents or scratches and preparing for painting; Repairing or replacing damaged windows, mirrors, glass or laminates; Repairing, replacing and maintaining interior flooring, side and ceiling panels.
- Assists with final preparation and detailing of METRO vehicles.
- Monitors the interior condition of vehicles and equipment and recommends repairs as needed.
- Recommends the purchase of tools, supplies, materials, and equipment needed for upholstery, body and glass repairs.
- Assists with maintaining an inventory of parts and tools for the upholstery shop.
- Maintains clean a working area.
- Maintains METRO property, tools and equipment provided.
- Performs pickup and delivery functions to satellite facilities.
- May assist with emergency road service calls and operate buses for maintenance purposes.
- Maintains written records of repairs on work orders.
- May provide work coordination and training for Upholsterer I incumbents, as assigned.



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- Operates a personal computer and standard business software.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Principles and practices of upholstery.
- Effective upholstery cleaning methods and supplies.
- Methods and materials used in the construction and repair of seat covers and backrests as well as the reconstruction and repair of seat assemblies, including springs, electrical, pneumatic/hydraulic and mechanical seat assemblies.
- Operation of a power sewing machine and related equipment, as well as hand tools used in the upholstery trade.
- Pattern drafting.
- General shop safety procedures, including the use of trade tools and personal safety equipment.
- Methods of performing routine automotive body repairs including spot painting.
- Occupational Safety and Health Standards applicable to bodywork and painting.
- Hazardous materials handling, disposal and safety practices.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Operate a power sewing machine and other tools and equipment used in the repair and maintenance of METRO vehicles.
- Read and understand technical information.
- Read, interpret and apply pattern instructions to measure, cut and sew padding and material accurately.
- Perform upholstery work using a variety of materials, including cloth, vinyl, canvas, and leather.
- Estimate material and labor costs.
- Reconstruct and repair seat assemblies.
- Perform minor vehicle body repairs.
- Operate a variety of vehicles and equipment, including forklifts, pallet jacks, and utility vehicles.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate effectively, both orally and in writing.



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- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Two (2) years of progressively responsible experience performing vehicle upholstery.

OR

Completion of an upholstery apprenticeship program AND one (1) year of progressively responsible experience in vehicle upholstery.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

The ability to obtain a valid California Class B driver's license is required.

SPECIAL REQUIREMENTS:

- Possession of, or ability to obtain, the tools necessary to perform the duties of the position.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May occasionally require working extended hours or hours outside of regular schedule.

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*Job Family: Maintenance

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HUMAN RESOURCES DEPARTMENT

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Class Code: Class Code
FLSA Status: Pending

Vehicle Body Repair Mechanic

Bargaining Unit: VMU

DEFINITION:

Under general supervision, a Vehicle Body Repair Mechanic performs maintenance work related to repairing and restoring damaged district vehicles to Original Equipment Manufacturer (OEM) specifications; maintains and repairs bus interiors, destination signs, windows and mirrors; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Body Repair Mechanic is a journey-level maintenance class. An incumbent in this class performs tasks to ensure the fleet's body structures and appearances are maintained in an acceptable condition.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Repairs damaged bodywork on District vehicles and equipment, including removing, disassembling, straightening, fitting, painting, frame measuring, and replacing damaged body panels or other component parts or systems.
- Inspects vehicles and equipment for damage; prepares estimates of labor, materials, and cost of repair; recommends parts repair or replacement.
- Recommends vehicle repairs by outside firms when needed; inspects work performed on District vehicles by repair and body shops.
- Repairs and replaces damaged windows, glass, and mirrors; maintains and repairs destination signs; repairs, replaces, and maintains interior flooring and side and ceiling panels; repairs and installs fiberglass and plastic parts.
- Wires and troubleshoots air systems; fabricates vehicles body parts by machining, welding or joining; performs metal shrinking.
- Operates and maintains a variety of manual and power equipment including, but not limited to, welding and cutting equipment, hammers, spoons, dollies, sanders, windshield cutters, measuring devices, friction jacks, grinders, hydraulic press, and electrical pliers and testers.
- Operates and maintains paint booth equipment; performs paint mixing, application of primer, color matching, clear coating, buffing, striping, wet sanding, waxing, detailing, blocking, blending, back taping, side mold installation, and brush touch-up.
- Maintains records of repairs on work orders.
- Communicates with vendors such as body repair shops and paint and equipment suppliers, as well as other staff.
- Trains departmental staff to assist in body repair tasks.
- Maintains District property, tools, and equipment; cleans work area, tools, and equipment; maintains a safe work environment, follows proper procedures for handling hazardous materials, and utilizes appropriate safety gear, apparel, and equipment.
- May recommend needs for tooling, equipment, materials, and supplies.
- Performs emergency repairs on road calls.



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- Maintains accurate written and electronic records, logs and work orders.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Methods, materials, hand tools and power equipment used in the repair and painting of buses, cars, vans, and trucks.
- Structure of vehicles, including the characteristics of the metals, plastics, and compounds used in vehicle construction.
- Principles and practices of bus and automotive body repair and painting.
- Safe work practices including working with hazardous materials and proper equipment operating procedures.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Repair body and frame damage to vehicles and equipment.
- Understand and follow oral and written instructions.
- Operate welding equipment, grinders, presses, sanders, and other equipment used in the repair and painting of District vehicles.
- Estimate labor hours, cost of parts and materials, and types of materials necessary to repair and paint a vehicle.
- Perform mathematical calculations accurately.
- Read and comprehend technical manuals and schematics.
- Perform heavy physical labor and work from ladders and scaffolds.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.



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- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

One (1) year of progressively responsible, journey-level experience in vehicle body repair and painting.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

AND

Must obtain a valid California Class B driver permit within one (1) month of employment AND must obtain a California Class B driver's license within three (3) months of employment.

SPECIAL REQUIREMENTS:

- Must possess tools (up to ¾ inch drive) necessary to perform the duties of the position and a rollaway toolbox.
- Driving record will be reviewed as part of the application process.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 80 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work. May work out in the field when needed. May require availability to work a flexible schedule.



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OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- Must be able to respond to emergency situations seven days per week, 24 hours per day.
- Must be able to work a variety of shifts, which may include weekdays or weekends; and day, swing and/or graveyard shifts.
- This position is considered a safety sensitive position and requires participation in METRO's drug and alcohol testing program.
- This position requires the use of personal protective equipment (PPE) based on the tasks assigned; safety shoes are required at all times.

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*Job Family: Maintenance

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HUMAN RESOURCES DEPARTMENT

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Class Code: Class Code
FLSA Status: Pending

Vehicle Service Detailer

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Vehicle Service Detailer performs maintenance work related to detailing and servicing METRO vehicles and equipment; performs semi-skilled minor repairs to bus interiors; assists with the replacement of seat cushions and backrests; may assist in semi-skilled minor body repairs as directed; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Vehicle Service Detailer is a journey-level class. An incumbent in this class performs tasks that ensure that METRO vehicles and equipment are thoroughly cleaned and maintained for the comfort of passengers and Bus Operators.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Performs a variety of skilled tasks in detailing, cleaning interiors of buses, equipment, and other METRO vehicles.
- Assists in the replacement of seat cushions and backrests, side panels and window trims; may assist in the semi-skilled repairs and replacement of body interiors as directed.
- Cleans tires and paints vehicle wheels, fareboxes, and other minor interior items with canned spray paint, brush and other chemical cleaning materials.
- May assist body shop personnel in the removal of masking paper and tape prior to detailing of buses and other METRO vehicles.
- Washes METRO buses and other vehicles with automated bus washing equipment.
- Vacuums or sweeps interiors of METRO vehicles.
- Empties trash receptacles on buses.
- Washes and scrubs floors, walls, and ceiling of bus interiors; removes all gum from floor and graffiti from seats, side panels, and ceiling.
- Waxes bus floors.
- Performs general housekeeping duties in maintenance facilities and equipment yard.
- Checks fuels, lubricants, coolant on METRO vehicles and replenishes as necessary.
- Checks tire wear and inflation level.
- Maintains proper service records, including all fuel, oil and hydraulic fluids used on equipment.
- Completes daily reports on all detailing work performed.
- May drive buses and vehicles between facilities for servicing and detailing as directed.
- Maintains accurate written and electronic records, logs and work orders.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.



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- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Automotive nomenclature.
- Proper use of lubricants and fuels.
- Various vehicle service functions.
- Types and use of cleaning products.
- Application and proper use of cleaning tools, equipment, and supplies.
- Hazards and safety precautions of the trade.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Read, interpret and apply METRO policies, procedures and regulations.
- Use a variety of cleaning equipment, supplies, solvents, and other chemicals safely in the performance of work.
- Operate power hand tools such as drills, grinders, sanders, air impact wrenches, and other tools used in the detailing of METRO buses and equipment.
- Perform minor touch-up painting on METRO buses and other vehicles.
- Give and follow both written and oral instructions.
- Follow established safety practices.
- Physically operate service equipment.
- Work outdoors at night.
- Work a flexible schedule, including weekdays, nights, and weekends.
- Work under deadlines and schedules.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Two (2) years of progressively responsible experience detailing, servicing and performing minor repairs on automotive, agricultural, and/or construction equipment.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the



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time of appointment and throughout employment.

Must be able to obtain a valid California Class B driver license is required.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May be required to work a flexible schedule, including nights and/or weekends.
- May occasionally require working extended hours or hours outside of regular schedule.

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*Job Family: Maintenance



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Class Code: Class Code
FLSA Status: Pending

Vehicle Service Worker I

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Vehicle Services Worker I performs a limited range of unskilled vehicle service and shop maintenance duties while learning to perform the full scope of journey-level work; cleans and maintains departmental equipment; maintains a variety of service records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Vehicle Service Worker I is the first working-level class in the series. An incumbent in this class performs the most routine vehicle service and shop maintenance tasks to maintain METRO vehicles and equipment. This class may be distinguished from the higher-level class of Vehicle Service Worker II because an incumbent in the latter class performs the full scope of journey-level work.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Cleans and maintains departmental equipment.
- Vacuums, sweeps and/or mops interior of buses and other METRO vehicles.
- Empties trash receptacles on buses.
- Washes METRO vehicles.
- Operates automated bus washing equipment.
- Cleans windows in METRO vehicles.
- Checks fuel, lubrication, coolant, and hydraulic system fluid levels and replenishes as necessary.
- Checks tire wear and inflation.
- Maintains proper service records, including all fuel, oil and hydraulic fluid used on equipment.
- Completes reports on all service work performed.
- Performs general housekeeping duties in garage and equipment yard.
- Posts and removes internal advertising and notice materials from buses.
- Drives METRO buses and vehicles between yards for servicing as directed.
- Performs other duties as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:

- Automotive maintenance nomenclature.
- Safe work practices.
- Proper use of lubricants and fuels.
- Standard vehicle service procedures.
- Types and usage of cleaning products.
- Application and proper use of cleaning tools, equipment, and supplies.
- Methods of maintaining information in digital or hard copy files.



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- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Read, interpret and apply METRO policies, procedures and regulations.
- Understand and follow oral and written instructions.
- Use a variety of cleaning equipment, supplies, solvents, and other chemicals safely in the performance of work.
- Follow established safety practices.
- Operate vehicle servicing equipment.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

One (1) year of experience servicing automotive, agricultural and/or construction equipment.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Must be able to obtain a valid California Class B driver license is required.

PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands



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While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May be required to work a flexible schedule, including nights and/or weekends.
- May occasionally require working extended hours or hours outside of regular schedule.

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*Job Family: Maintenance



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HUMAN RESOURCES DEPARTMENT

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Class Code: Class Code
FLSA Status: Pending

Vehicle Service Worker II

Bargaining Unit: SEA

DEFINITION:

Under general supervision, a Vehicle Services Worker II performs unskilled vehicle service and shop maintenance work; cleans and maintains departmental equipment; maintains a variety of service records; and performs other duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Vehicle Service Worker II is the journey-level class in the series. An incumbent in this class performs journey-level unskilled tasks to maintain METRO vehicles and equipment. This class is distinguished from the lower-level class of Vehicle Service Worker I because an incumbent in the latter class performs a limited range of routine duties while learning to perform the full scope of journey-level work. It is also distinguished from the higher-level class of Senior Vehicle Service Worker because an incumbent in the latter class serves as a lead worker over subordinate staff.

EXAMPLES OF DUTIES AND RESPONSIBILITIES:

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

- Cleans and maintains departmental equipment.
- Vacuums, sweeps and/or mops interior of buses and other METRO vehicles.
- Empties trash receptacles on buses.
- Washes METRO vehicles and equipment.
- Operates automated bus washing equipment.
- Cleans windows in METRO vehicles.
- Checks fuel, lubrication, coolant, and hydraulic system fluid levels and replenishes as necessary.
- Checks tire wear and inflation.
- Maintains proper service records, including all fuel, oil and hydraulic fluid used on equipment.
- Completes reports on all service work performed.
- Performs general housekeeping duties in garage and equipment yard.
- Posts and removes internal advertising and notice materials from buses.
- Drives METRO buses and vehicles between yards for servicing as directed.
- May assist with training Vehicle Service Worker I's if assigned.
- Maintains accurate written and electronic records, logs and work orders.
- Performs data entry to update and maintain information in digital files; may maintain spreadsheets and other documents to track information.
- Operates standard office equipment including a computer, typewriter, photocopy machine, and fax machine; utilizes computer software in performing job tasks.
- May drive a METRO vehicle to perform assignments.
- Performs other work as assigned.

EMPLOYMENT STANDARDS:

Knowledge of:



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- Automotive maintenance nomenclature.
- Safe work practices.
- Proper use of lubricants and fuels.
- Standard vehicle servicing procedures.
- Types and use of cleaning products.
- Application and proper use of cleaning tools, equipment, and supplies.
- Methods of maintaining information in digital or hard copy files.
- Methods of prioritizing, planning and organizing work.
- Time management techniques.
- Customer service techniques.
- Basic mathematics including addition, subtraction, multiplication, division, and percentages.
- Correct English usage, grammar, spelling, punctuation, and vocabulary.
- The effective use of modern office equipment, personal computers, and applicable standard business software.

Ability to:

- Read, interpret and apply METRO policies, procedures and regulations.
- Understand and follow oral and written instructions.
- Use a variety of cleaning equipment, supplies, solvents, and other chemicals safely in the performance of work.
- Follow established safety practices.
- Operate vehicle service equipment.
- Maintain records and control systems with accuracy and attention to detail.
- Input data into a database.
- Adhere to established work schedules and timelines.
- Use good judgment and discretion when performing assignments.
- Effectively balance multiple assignments simultaneously.
- Utilize standard office equipment and computer software and learn to use specialized METRO software if assigned.
- Communicate clearly and effectively, both orally and in writing.
- Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

MINIMUM QUALIFICATIONS:

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

Education, Training and Experience:

Two (2) years of progressively responsible experience servicing automotive, agricultural and/or construction equipment.

LICENSES AND CERTIFICATES:

Depending on assignment, a valid California driver license and safe driving record may be required at the time of appointment and throughout employment.

Must be able to obtain a valid California Class B driver license is required.



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PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk and stand; reach, twist, turn, kneel, bend, squat and stoop; talk and hear; use hands to grasp, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional overhead reaching and lifting up to 50 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

Work Environment:

The employee works in a shop or outdoor environment where the noise level is usually noisy. The employee may be exposed to inclement weather, fumes, dust, grease, air contaminants, and hazardous materials and chemicals during the course of work.

OTHER CONDITIONS OF EMPLOYMENT:

- Must pass requisite background check.
- May be required to work a flexible schedule, including nights and/or weekends.
- May occasionally require working extended hours or hours outside of regular schedule.

*Adopted: 00-00-00
*BOD Approved: 00-00-00
*Revised: 00-00-00
*Job Family: Maintenance