Attachment A

SACRAMENTO AREA COUNCIL OF GOVERNMENTS

CLASSIFICATION PLAN

Last Amended by SACOG
Board of Directors
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Section I – Introduction

Background

In January 2015, Sacramento Area Council of Governments (SACOG) conducted a comprehensive classification study for all positions at the agency. This study was precipitated by several factors:

- The concern of management that the classification descriptions should reflect the level and scope of work performed;
- To ensure that classification descriptions reflect contemporary standards, responsibilities, duties, qualifications, and technology;
- To reflect past and allow for future organizational changes such as the change from a traditional hierarchical to a team-based structure and culture;
- The desire to have a classification plan that can meet the needs of this progressive organization; and
- The desire to ensure that SACOG has adequate career paths and a classification system that will foster career growth and service within the organization.

Goals and Objectives

The goals and objectives of the study were to:

- Recognize the scope and level of the various positions including designing classifications with clearly defined differences and establishing and consistently applying writing standards for specification language;
- Eliminate outdated classifications;
- Consolidate positions with similar scope and level of responsibility, transferability of knowledge, skills, abilities, education, experience, licenses, and certifications into broader classifications;
- Be perceived as equitable by management and employees alike by maintaining regular and clear communication with employees and management, making classification decisions based on work performed (rather than individual competencies and experience), avoiding using classifications to resolve compensation issues and to reward performance, and documenting processes and procedures as appropriate;
- Provide for growth and flexibility of assignment, where feasible, in recognition that some job duties and responsibilities may evolve over time;
- Be responsive to changing business needs;
- Provide adequate career paths that will foster career service within SACOG;
- Develop classification descriptions that clearly state minimum requirements (i.e. knowledge, skills, abilities, education, experience, certifications, and licenses) of each classification that are consistent with experience and training that is clearly obtainable by positions immediately below on the career ladder and clarify opportunities for promotion and/or cross training;
- Provide a classification structure that ensures regulatory compliance, including allocation of each position to the correct classification with appropriate Fair Labor Standards Act (FLSA) designation, as well as, meeting Federal Americans with Disabilities Act (ADA) regulations; and

- Develop a Classification Plan that documents the classification study methodology, findings and recommendations and serves as a guide for SACOG to maintain the Plan in the future.

Classification Study Methodology

The following provides an overview of the classification study methodology utilized to develop the Classification Plan.

A. Orientation Meetings with Employees and Distribution of Position Description Questionnaire
   - Orientation meetings for all study participants and Team Managers were held to clarify study objectives and procedures, answer questions, and distribute the position description questionnaire (PDQ) forms.

B. Position Description Questionnaire Completion & Review
   - Employees completed the PDQ forms and their primary Team Managers reviewed, commented, and signed off on the forms.

C. Employee and Team Manager Interviews
   - Employees were interviewed to clarify and supplement the PDQ data.
   - Team Managers were interviewed to clarify and/or confirm the information received in the interviews with staff and to respond to potential perception differences regarding roles, tasks, and scope.

D. Classification Concept and Position Allocation Development
   - Following the analysis of the classification information gathered, classification concepts and position allocations were developed and recommended.
     - Classification concept recommendations include expanding or collapsing class series and/or separating or combining classifications assigned to different functional areas; identifying and defining classification levels and career ladders; and updating established titling guidelines for the studied classifications for appropriate and consistent titling.
     - Specific position allocation recommendations include specifying current and proposed classification title and impact of the recommendations (reclassification, title change, or no change (i.e., update of classification description format and/or content only)).
     - Recommendations for title change and reclassification are made to more clearly reflect the level and scope being performed, as well as establish consistency with the labor market and industry standards.
   - As a result of the study, there were several positions that were recommended for title changes and/or reclassification. Appendix I includes the specific allocation recommendations for each position included in the classification study

E. Draft Class Description Development
   - New and/or updated class descriptions were developed for each proposed classification, updating duties, responsibilities, and minimum qualifications of each class specification, or developing new class specifications if duties, responsibilities, and minimum qualifications changed significantly.
   - A consistent classification description format was developed including title, definition, supervision received/exercised, class (distinguishing) characteristics, examples of typical

functions, qualifications (knowledge, skills, and abilities, education and experience, and licensing and certifications), physical demands, and environmental conditions.
- Compliance with Fair Labor Standards Act (FLSA) and Americans with Disabilities Act (ADA) requirements was reviewed and updated.

F. Class Description Review and Update
- Draft copies of the new classification descriptions were submitted to employees and Team Managers to provide comments and concerns regarding any modifications and to ensure that no factual information was overlooked and that the recommendations were fair and consistent.
- Allocation recommendations and/or classification descriptions were revised, as appropriate, based on employee and Team Manager feedback. Appendix II contains the revised and final classification descriptions.

G. Classification Plan Development
- The Classification Plan was developed and contains: goals and objectives, classification methodology and recommendations; classification concepts; Plan maintenance; and classification descriptions.

Section II – Classification Plan Concepts

The Purpose of a Classification Plan

A Classification Plan is a systematic framework for grouping jobs into common classifications based on similarities in duties, responsibilities, and requirements.

The purpose of a Classification Plan is to provide an appropriate basis for making a variety of human resources decisions such as the:

- Development of job-related recruitment and selection procedures;
- Clear and objective appraisal of employee performance;
- Development of career paths, training plans, and succession planning;
- Design of an equitable and competitive salary structure;
- Organizational development and change management; and
- Provision of an equitable basis for discipline and other employee actions.

In addition to providing this basis for various human resources management and process decisions, a Classification Plan can also effectively support systems of administrative and fiscal control. Grouping of positions into an orderly classification system supports planning, budget analysis and preparation, and various other administrative functions.

Within a Classification Plan, classifications can either be broad (containing a number of positions) or narrow (emphasizing individual job characteristics). Broad classifications are indicated when:

- Employees can be hired with a broad spectrum of knowledge, skill, and/or academic preparation and can readily learn the details of SACOG, the team, and the position on-the-job; or
- There is a need for flexibility of the assignment within an organization due to changing programs, technologies, or workload.

Individualized classifications are indicated when:

- There is an immediate need to recruit for specialty knowledge and skills;
- There is a minimum of time or capability for on-the-job training; or
- There is an organizational need to provide for specific job recognition and to highlight the differences between jobs.

SACOG's Classification Plan is reflective of a combination of these two sets of factors and is the most practicable in SACOG's changing environment and service delivery expectations.

The Difference between Positions and Classifications

"Position" and "Classification" are two terms that are often used interchangeably, but have very different meanings. As used in this Plan:

- A position is an assigned group of duties and responsibilities performed by one person. A position can be full-time, part-time, regular, temporary, filled, or vacant. Often the word "job" is used in place of the word "position."

- A classification or class may contain only one position or may consist of a number of positions. When you have several positions assigned to one class, it means that the same classification title is appropriate for each position; that the scope, level, duties, and responsibilities of each position assigned to the class are sufficiently similar (but not identical), and that the same core knowledge, skills, and other requirements are appropriate for all positions in the class.

The description of a position often appears as a job description or working desk manual, going into detail regarding work process steps, while a classification description emphasizes the general scope and level of responsibilities, plus the knowledge, skills, and other requirements for successful performance.

When positions are classified, the focus is on assigned job duties and the job related requirements for successful performance, not on individual employee capabilities or amount of work performed. Positions are thus evaluated and classified on the basis of such factors as knowledge and skill required to perform the work, the complexity of the work, the authority delegated to make decisions and take action, the responsibility for the work of others and/or for budget expenditures, contacts with others (both inside and outside of the organization), and the impact of the position on the organization and working conditions.

The Relationship of Classification and Compensation

Classification and the description of the work and the requirements to perform the work are separate and distinct from determining the worth of that work in the labor market and to the organization. While recommending the appropriate compensation for the work of a class depends upon an understanding of what that work is and what it requires (as noted above), compensation levels are influenced by two factors:

- The external labor market; and
- Internal relationships within the organization.

Classification Description Format

The classification descriptions are based upon the information from the written PDQs completed by each employee and from information provided by employees and Team Managers during the review processes. These descriptions provide:

- A written summary documenting the work performed by the incumbents of these classifications;
- Distinctions among the classes; and
- Documentation of requirements and qualifications to assist in the recruitment, selection, and career development processes.

Just as there is a difference between a position and a classification, there is also a difference between a position description and a classification description. A position description, often known as a "desk manual", generally lists each duty an employee performs and may also have information about how to perform that duty. A classification description normally reflects several positions and is a summary document that does not list each duty performed by every employee. The classification description, which is broader and more general and informational, is intended to indicate the general scope and level of responsibility and requirements of the classification, not detail-specific position responsibilities.

The sections of each classification description are as follows:

Title: This should be brief and descriptive of the classification and consistent with other titles in the classification plan and the occupational area.

- The title of a classification is normally used for organization, classification, and compensation purposes within SACOG. Often working titles are used within a team to differentiate an individual. All positions have a similar level of scope and responsibility; however, the working titles may give assurance to a member of the public that they are dealing with an appropriate individual. Working titles should be authorized by Human Resources to ensure consistency within SACOG and across team lines.

Definition: This provides a capsule description of the classification and should give an indication of the type of supervision received, the scope and level of the work and any unusual or unique factors. The phrase "performs related work as required" is not meant to unfairly expand the scope of the work performed, but to acknowledge that classifications change and that not all duties are included in the classification description.

Supervision Received and Exercised: This section specifies which class or classes provide supervision to the classification being described and the type and level of work direction or supervision provided to this classification. The section also specifies what type and level of work direction or supervision the classification provides to other classes. This assists the reader in defining where the class "fits" in the organization.

Class Characteristics: This can be considered the "editorial" section of the description, slightly expanding the Definition, clarifying the most important aspects of the classification and distinguishing this classification from the next lower- and higher-levels in a class series or from a similar classification in a different occupational series.

Examples of Typical Job Functions: This section provides a list of the major and typical duties, intended to define the scope and level of the classification and to support the Qualifications, including Knowledge and Skills. This list is meant to be illustrative only. It should be emphasized that the description is a summary document, and that duties change depending upon program requirements, technology, and organizational needs.

Qualifications: This element of the description has several sections:

- A listing of the job-related knowledge, skills, and abilities required to successfully perform the work. They must be related to the duties and responsibilities of the work and capable of being validated under the Equal Employment Opportunity Commission's Uniform Guidelines on Selection Procedures. Knowledge (intellectual comprehension)

and Abilities (acquired proficiency) should be sufficiently detailed to provide the basis for selection of qualified employees.

- A listing of educational and experience requirements that outline minimum and alternative ways of gaining the knowledge and skills required for entrance into the selection process. These elements are used as the basic screening technique for job applicants.

- Licenses and/or certifications identify those specifically required in order to perform the work. These certifications are often required by an agency higher than SACOG (i.e., the State) and can therefore be appropriately included as requirements.

Physical Demands: This section identifies the basic physical abilities required for performance of the work. These are not presented in great detail (although they are more specifically covered for documentation purposes in the PDQs) but are designed to indicate the type of pre-employment physical examinations (i.e., lifting requirements and other unusual characteristics are included, such as "finger dexterity needed to access, enter, and retrieve data using a computer keyboard") and to provide an initial basis for determining reasonable accommodation for ADA purposes.

Environmental Elements: These can describe certain outside influences and circumstances under which a job is performed; they give employees or job applicants an idea of certain risks involved in the job and what type of protective gear may be necessary to perform the job. Examples are loud noise levels, cold and/or hot temperatures, vibration, confining workspace, chemicals, mechanical and/or electrical hazards, and other job conditions.

Fair Labor Standards Act (FLSA)

One of the major components of the job analysis and classification review is the determination of each classification's appropriate FLSA status, i.e., exempt vs. non-exempt from the FLSA overtime rules and regulations.

As a note, although it is more common for all positions within a classification to be under the same FLSA status, potentially there could be both exempt and non-exempt positions within a classification. Thus it is important that each position be analyzed to determine FLSA status.

Data on each position's typical job functions collected from the PDQs and interviews were analyzed to determine FLSA status. There are three (3) levels for the determination of the appropriate FLSA status that are utilized and on which recommendations are based. Below are the steps used for the determination of *Exempt* FLSA status:

1. *Salary Basis Test* – The incumbents in a classification are paid at least $455 per week ($23,660 per year), not subject to reduction due to variations in quantity/quality of work performed. Note: computer professionals' salary minimum is defined in hourly terms as $27.63 per hour.

2. *Exemption Applicability* – The incumbents in a classification perform any of the following types of jobs:

- Executive: Employee whose primary duty is to manage the business or a recognized department/entity and who customarily directs the work of two or more employees. This also includes individuals who hire, fire, or make recommendations that carry particular weight regarding employment status. Examples: executive, director, owner, manager, supervisor.
- Administrative: Employee whose primary activities are performing office work or non-manual work on matters of significance relating to the management or business operations of the firm or its customers and which require the exercise of discretion and independent judgment. Examples: coordinator, administrator, analyst, accountant.
- Professional: Employee who primarily performs work requiring advanced knowledge/education and which includes consistent exercise of discretion and independent judgment. The advanced knowledge must be in a field of science or learning acquired in a prolonged course of specialized intellectual instruction. Examples: engineer, attorney, statistician, architect, biologist.
- Computer professional: Employee who primarily performs work as a computer systems analyst, programmer, software engineer, or similarly skilled work in the computer field performing a) application of systems analysis techniques and procedures, including consulting with users to determine hardware, software, or system functional specifications; b) design, development, documentation, analysis, creation, testing, or modification of computer systems or programs, including prototypes, based on and related to user or system design specification; or c) design, documentation, testing, creation, or modification of computer programs based on and related to user or system design specifications; or a combination of the duties described above, the performance of which requires the same level of skills. Examples: system analyst, database analyst, network architect, software engineer, programmer.

3. *Job Analysis* – A thorough job analysis of the job duties must be performed to determine exempt status. An exempt position must pass both the salary basis and duties tests. The job analysis should include:

    - Review of the minimum qualifications established for the job;
    - Review of prior class descriptions, questionnaires, and related documentation;
    - Confirmation of duty accuracy with management; and
    - Review and analysis of workflow, organizational relationships, policies, and other available organizational data.

Non-exempt positions work within detailed and well-defined sets of rules and regulations, policies, procedures, and practices that must be followed when making decisions. Although the knowledge base required to perform the work may be significant, the framework within which incumbents work is fairly restrictive and finite. (Please note that FLSA does not allow for the consideration of workload and scheduling when it comes to exemption status).

Finally, often times a position performs both non-exempt and exempt duties, so analysis on time spent on each type of duties should be performed. If a position performs mostly non-exempt duties (i.e. more than 50% of time), then the position would be considered non-exempt.

Classification Structure and Allocation Factors

The Classification Plan provides SACOG with a systematic classification structure based on the interrelationship between duties performed, the nature and level of responsibilities, and other work-related requirements of the jobs.

A Classification Plan is not a stable, unchanging entity. Classification Plans may be updated and revised by conducting classification studies that are organizational wide (review of the all classifications and positions) or position-specific. The methodology used for both types of studies are the same, as outlined above.

For either type of study, when identifying appropriate placement of new and/or realigned positions within the classification structure, there are general allocation factors to consider. By analyzing these factors, SACOG will be able to change and grow the organization while maintaining the classification plan.

1. Type and Level of Knowledge and Skill Required

This factor defines the level of job knowledge and skill, including those attained by formal education, technical training, on-the job experience, and required certification or professional registration. The varying levels are as follows:

A. The basic or entry-level into any occupational field
This entry-level knowledge may be attained by obtaining a high school diploma, completing specific technical course work, or obtaining a four-year or advanced college or university degree. Little to no experience is required.

B. The experienced or fully competent-level in any occupational field
This knowledge and skill level recognizes a class that is expected to perform the day-to-day functions of the work independently, but with guidelines (written or oral) and supervisory assistance available. This level of knowledge is sufficient to provide on-the-job instruction to a fellow employee or an assistant when functioning in a lead capacity. Certifications may be required for demonstrating possession of the required knowledge and skills.

C. The advanced level in any occupational field
This knowledge and skill level is applied in situations where an employee is required to perform or deal with virtually any job situation that may be encountered. Guidelines may be limited and creative problem solving may be involved. Supervisory knowledge and skills are considered in a separate factor and should not influence any assessment of this factor.

2. Management Responsibility

This factor defines the team and/or program management responsibility, including short and long-range planning, budget development and administration, resource allocation, policy and procedure development, and supervision and direction of staff.

It should be noted that at all levels, responsibilities may include partial or full project or program management responsibility such as developing work plans consisting of mission, objectives, scope of work, budget, schedules, baseline requirements, and implementation strategies; identifying strategic, project management, and external issues; recommending solutions; and

implementing solutions to manage risks and issues for assigned studies, projects, and/or programs

A. No ongoing direction of staff
The employee is responsible for the performance of his or her own work and may provide side-by-side instruction to a co-worker.

B. Team Manager
The focus of the job is on the supervision and coordination of assigned teams and also includes hands-on participation in the work activities of those supervised. The employee makes effective recommendations and/or carries out selection, performance evaluation, and disciplinary procedures.

C. Manager
The employee is considered management, often supervising multiple teams through Team Managers or management of complex, multi-disciplinary, and/or strategic programs. In addition to the responsibilities outlined above, responsibilities include allocating staff and budget resources among competing demands and performing significant program and service delivery planning and evaluation. Normally, this level would be titled a program or division manager.

The Team Manager spends a portion of their time performing the same duties as those supervised within their subunit(s), while a Manager spends majority of their time on administrative, long- and short-term planning, and budgeting responsibilities. The managerial-level develops, recommends, and sets the programs, projects, goals, and policies and procedures of teams and programs, while the Team Manager is more involved in the day-to-day implementation and execution of those programs, projects, and policies and procedures.

D. Executive Management
The employee has administrative responsibility for all organizational programs, projects, and operations and reports to the Chief Executive Officer (i.e. Executive Director) or Board of Directors.

3. Supervision Received

A. Direct Supervision
Direct supervision is usually received by entry-level employees and trainees, i.e., employees who are new to the organization and/or position they are filling. Initially under close supervision, incumbents learn to apply concepts and work procedures and methods in assigned area of responsibility to resolve problems of moderate scope and complexity. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. As experience is gained, assignments become more varied and are performed with greater independence.

B. General Supervision
General supervision is usually received by the experienced and fully competent-level employees, i.e., employees who have been in a position for a period of time and have had the opportunity to be trained and learn most, if not all, duties and responsibilities of the assigned

classification. Incumbents are cross-trained to perform the full range of technical work in all of the areas of assignment.

At the experienced-level, positions exercise some independent discretion and judgment in selecting and applying work procedures and methods. Assignments and objectives are set for the employee and established work methods are followed. Incumbents have some flexibility in the selection of steps and timing of work processes.

Fully competent positions receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of assigned projects, programs, and team(s). Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements, and the methodology used in arriving at the end results are not reviewed in detail.

C. General Direction

General direction is usually received by senior level or management positions. Work assignments are typically given as broad, conceptual ideas and directives and incumbents are accountable for overall results and responsible for developing guidelines, action plans, and methods to produce deliverables on time and within budget.

D. Administrative and Policy Direction

Administrative direction is usually received by executive management classifications. The incumbent is accountable for accomplishing agency-wide planning and operational goals and objectives within legal and general policy and regulatory guidelines. The incumbent is responsible for the efficient and economical performance of the organization's operations.

4. Problem Solving

This factor involves analyzing, evaluating, reasoning and creative thinking requirements. In a work environment, not only the breadth and variety of problems are considered, but also guidelines, such as supervision, policies, procedures, laws, regulations, and standards available to the employee.

A. Structured problem solving

Employees learn to apply concepts and work procedures and methods in assigned area of responsibility and to resolve problems and issues that are specific, less complex, and/or repetitive. Exceptions or changes in procedures are explained in detail as they arise.

B. Independent, guided problem solving

Work situations require making independent decisions among a variety of alternatives; however, policies, procedures, standards, and regulations and/or the Team Manager are available to guide the employee towards problem resolution.

C. Application of discriminating choices

Work situations require independent judgment and decision-making authority when identifying, evaluating, adapting, and applying appropriate concepts, guidelines, references, laws, regulations, policies, and procedures to resolve diverse and complex problems and issues.

D. Creative, evaluative, or critical thinking
The work involves a high-level of problem-solving requiring analysis of unique issues or increasingly complex problems without precedent and/or structure and formulating, presenting, and implementing strategies and recommendations for resolution.

5. Authority for Making Decisions and Taking Action

This factor describes the degree to which employees have the freedom to take action within their job. The variety and frequency of action and decisions, the availability of policies, procedures, laws, and supervisory or managerial guidance, and the consequence or impact of such decisions are considered within this factor.

A. Direct, limited work responsibility
The employee is responsible for the successful performance of his or her own work with little latitude for discretion or decision-making. Work is usually supervised while in progress and fits an established structure or pattern. Direct supervision is readily available.

B. Decision-making within guidelines
The employee is responsible for the successful performance of their own work, but able to prioritize and determine methods of work performance within general guidelines. Supervision is available, although the employee is expected to perform independently on a day-to-day basis. Emergency or unusual situations may occur, but are handled within procedures and rules. Impact of decisions is normally limited to the team, project, or program to which assigned.

C. Independent action with focus on work achieved
The employee receives assignments in terms of long-term objectives, rather than day-to-day or weekly timeframes. Broad policies and procedures are provided, but the employee has latitude for choosing techniques and deploying staff and material resources. Impact of decisions may have significant team, program, or agency-wide service delivery and/or budgetary impact.

D. Decisions made within general policy or elected official guidance
The employee is subject only to the policy guidance of elected officials and/or broad regulatory or legal constraints. The ultimate authority for achieving the goals and objectives of SACOG are with this employee.

6. Interaction with Others

This factor includes the nature and purpose of contacts with others, from simple exchanges of factual information to the negotiation of difficult issues. It also considers with whom the contacts are made, from co-workers and the public to elected or appointed public officials.

A. Exchange of factual information
The employee is expected to use ordinary business courtesy to exchange factual information with co-workers and the public. Strained situations may occasionally occur, but the responsibilities are normally not confrontational.

B. Interpretation and explanation of policies and procedures
The employee is required to interpret policies and procedures, apply and explain them, and influence the public or others to abide by them. Problems may need to be defined and clarified and individuals contacted may be upset or unreasonable. Contacts may also be made with individuals at all levels throughout SACOG.

C. Influencing individuals or groups
The employee is required to interpret laws, policies, and procedures to individuals who may be confrontational or to deal with members of professional, business, community, or other groups or regulatory agencies as a representative of SACOG.

D. Negotiation with organizations from a position of authority
The employee often deals with the Board of Directors, elected officials, government agencies, and other outside agencies, and the public to advance and represent the priorities and interests of SACOG and member jurisdictions, provide policy direction, and/or negotiate solutions to difficult problems.

7. Working Conditions/Physical Demands

This factor includes specific physical, situational, and other factors that influence the employee's working situation. This factor may not be as of high importance as the other factors since most of SACOG's classifications perform work in a normal office or similar setting during regular office hours. However it is important that this factor be considered when allocating a position to the classification structure.

A. Normal office or similar setting
The work is performed in a normal office or similar setting during regular office hours (occasional overtime may be required, but compensated for). Responsibilities include meeting standard deadlines, using office and related equipment, lifting materials weighing up to 25 pounds, and communicating with others in a generally non-stressful manner.

B. Varied working conditions with some physical or emotional demands
The work is normally performed indoors, but may have some exposure to noise, heat, weather, or other uncomfortable conditions. Stand-by, call back, or regular overtime may be required. The employee may have to meet frequent deadlines, work extended hours, and maintain attention to detail at a computer or other machinery, deal with difficult people, or regularly perform moderate physical activity.

C. Difficult working conditions and/or physical demands
The work has distinct and regular difficult demands. Shift work (24-7 or rotating) may be required; there may be exposure to hazardous materials or conditions; the employee may be subject to regular emergency callback and extended shifts; and/or the work may require extraordinary physical demands.

Based on the above factors, in the maintenance of the classification plan when an employee is assigned an additional duty or responsibility and requests a change in classification, it is reasonable to ask:

- What additional knowledge and skills are required to perform the duty?
- How does one gain this additional knowledge and skills – through extended training, through a short-term seminar, through on-the-job experience?
- Does this duty or responsibility require new or additional supervisory responsibilities?
- Is there a greater variety of or are there more complex problems that need to be solved as a result of the new duty?
- Does the employee have to make a greater variety of or more difficult decisions as a result of this new duty?
- Are the impacts of decisions greater because of this new duty (effects on staff, budget, team or SACOG-wide activities, and/or relations with other agencies)?
- Are guidelines, policies, and/or procedures provided to the employee for the performance of this new duty?
- Is the employee interacting with internal and external stakeholders others more frequently or for a different purpose as a result of this new assignment?
- Have the working or physical conditions of the job changed as a result of this new assignment?

The analysis of the factors outlined above, as well as the answers to these questions will help to guide the placement of specific positions to the existing classification structure and/or revision of entire classification structure.

Classification Levels

Within the classification structure, classifications can be generally categorized according to the following levels:

- Trainee
- Entry
- Experienced
- Fully Competent (or Journey)
- Senior (or Advanced Journey)
- Manager
- Executive

Classifications may consist of a multiple levels called a classification series (such as Administrative Assistant I (entry) and Administrative Assistant II (fully competent)) or consist of a single level (such as Accountant (fully competent)). The existence of levels depends on the availability of work and SACOG's needs and priorities.

It should be noted that even though two classifications are allocated to the same level this does not mean that both classifications are equitable in terms of compensation. The levels within the classification series are distinguished from one another based on the classification factors discussed above, as well as the level of responsibility and complexity of the work performed.

Here are general definitions of each level:

Trainee: This classification may be used for persons who have completed academic requirements but are working toward professional certification or registration, for persons for whom experience is a prerequisite for entrance to graduate school, or for persons who have received a degree or diploma but are taking additional coursework or need work experience for a specific career field. Assignments help SACOG achieve program and project objectives and provide the incumbent with on-the-job exposure in a professional or technical field of study related to SACOG's services, programs, and projects.

Entry: Initially under close supervision, incumbents learn to apply concepts and work procedures and methods in assigned area of responsibility to resolve problems of moderate scope and complexity. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. As experience is gained, assignments become more varied and are performed with greater independence.

Experienced: Incumbents in this class provide support to assigned programs, projects, and services on assigned team(s). Positions perform work of lesser complexity and/or a specific phase of a larger or more complex program or project under the guidance an Associate or Senior Analyst. Positions exercise some independent discretion and judgment in selecting and applying work procedures and methods. Assignments and objectives are set for the employee and established work methods are followed. Incumbents have some flexibility in the selection of steps and timing of work processes.

Fully Competent: Incumbents independently perform assigned duties; develop solutions to a wide range of issues; demonstrate independent judgment in selecting methods and techniques for obtaining solutions; and/or serve as a professional-level resource for issues which are complex in nature and diverse in scope. Positions at this level have experience that enables them to represent SACOG to the Board, other public agencies, legislators, private and community organizations, regulatory and governmental agencies, and the public. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of assigned projects, programs, and team(s). Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements, and the methodology used in arriving at the end results are not reviewed in detail.

Senior: Incumbents serve as a technical expert in multiple disciplinary and/or programmatic areas using initiative and resourcefulness in deviating from traditional methods or researching trends and patterns to develop new methods, criteria, or proposed new policies and procedures. Positions in this class are typically assigned to manage large, complex, and multi-disciplinary projects, programs, studies, and initiatives that involve contact outside of the agency and the ability to manage multiple stakeholder interests, require a high level of technical expertise and acumen in support of management and/or Board priorities, strategic initiatives, and directives, and are of high visibility and sensitivity to SACOG in areas of its core business initiatives. The work involves a high-level of problem-solving requiring analysis of unique issues or increasingly complex problems without precedent and/or structure and formulating, presenting, and implementing strategies and recommendations for resolution. Work assignments are typically given as broad, conceptual ideas and directives and incumbents are accountable for overall results and responsible for developing guidelines, action plans, and methods to produce deliverables on time and within budget.

Manager: Manages all activities related to assigned teams, programs, and projects including short- and long-term planning and development and administration of team policies, procedures, and services. This class provides assistance to the Chief Operating Officer/General Counsel in a variety of administrative, coordinative, analytical, and liaison capacities. Successful performance of the work requires knowledge of public policy, SACOG functions and activities, and the ability to develop, oversee, and implement multiple programs, projects, and services in assigned area of responsibility. Responsibilities include coordinating the activities of assigned teams with those of other teams and outside agencies and managing and overseeing the complex and varied functions of assigned teams. The incumbent is accountable for accomplishing team planning and operational goals and objectives and for furthering SACOG goals and objectives within general policy guidelines.

Executive: Oversees, directs, and participates in all activities of SACOG's operations, including enforcement of all SACOG policies and procedures and local, state, and federal regulations, the conduct of all financial activities, and the efficient and economical performance of SACOG's operations.

The following table represents an overview of the classifications in the plan and the level they are allocated to:

Classification Level	Classifications
Trainee	• Staff Assistant
Entry	• Administrative Assistant I • Analyst I
Experienced	• Analyst II
Fully Competent	• Accountant • Accounting Specialist • Administrative Assistant II • Associate Analyst • Clerk of the Board/Executive Assistant • Graphic Designer • Information Technology Administrator • Research Technician
Senior	• Senior Analyst
Manager	• Manager
Executive	• Chief Executive Officer • Chief Operating Officer/General Counsel

The allocation factors outlined above should be analyzed to determine the allocation of a position to a specific classification level. Appendix III contains assessment rubrics to be used when recommending allocation of a position within the Administrative Assistant classification series or Analyst classification series.

Section III – Classification Plan

Classification List and Allocation of Positions

The following is a table represents the classifications contained in the Plan and the allocated positions per classification. This is only for informational purposes and does not reflect a policy decision on the number of positions in any classification.

Classification Title	Number of Allocated Positions
Accountant	2
Accounting Specialist	1
Administrative Assistant I	2
Administrative Assistant II	3
Analyst I	1
Analyst II	5
Associate Analyst	15
Senior Analyst	11
Chief Executive Officer	1
Chief Operating Officer/General Counsel	1
Clerk of the Board/Executive Assistant	1
Graphic Designer	1
Information Technology Administrator	1
Manager	9
Research Technician	1
Staff Assistant	1
Total	56

Note: Table effective as of September 2015.

Classification Descriptions

Classification descriptions broadly define the most essential tasks, responsibilities and qualifications. They are intended to give an overview of an entire class, not detailed specifications of every position within the class. The classification descriptions are included in Appendix II of the Plan.

Job Descriptions

Since the classification descriptions are broad, it is beneficial for SACOG to develop job descriptions that provide detailed, position-specific duties and qualifications pertinent to the specific assignments. Job descriptions would follow a similar format to the classification specification:

- Purpose (similar purpose to classification description Definition)

- Job Duties: This section provides a list of the major and typical duties, intended to define the scope and level of the job and to support the Qualifications, including Knowledge and Abilities. Similar to the classification specifications, this list is meant to represent the nature and level of duties of the assignment and are not intended to be an inclusive list. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position. The duties included in this section would be applicable to the specific position. *For example, an Associate Analyst assigned to Land Use Planning conducts technical work using Geographic Information Systems (GIS) and related tools to create alternative scenarios and a preferred scenario by analyzing various economic, housing, employment, and other demographic data and performance measures; coordinates and contributes to the development of the Environmental Impact Report (EIR) including writing sections of the report and providing technical review of sections written by other staff and consultants; develops maps, charts, and graphs to support the Metropolitan Transportation Plan/Sustainable Communities Strategies (MTP/SCS); and reviews technical materials for and attends meetings with SACOG staff, member jurisdictions, other stakeholders to discuss issues related to land use planning and/or MTP/SCS projects.*
- Qualifications and Education and Experience: The intent of these sections is similar to the sections in the classification description. These sections would specify areas of knowledge and abilities as well as education and experience required of positions. *For example, an Associate Analyst assigned to Land Use Planning would require knowledge of federal, state, and local planning regulations relevant to land use and transportation planning and Metropolitan Planning Organizations (MPOs); principles and practices of Transportation Demand Management modeling tools used by MPOs in assessing MTP/SCS; and theories, principles, and practices of urban planning and development as applied to preparation of regional transportation plans. Additionally the job description specify a four-year degree with major coursework in transportation planning, urban planning, civil engineering, or a related field and professional urban or regional planning experience focused on transportation issues.*

The process of writing the job description would be similar to writing the classification description. The information from the employee completed PDQ forms and data gathered during the employee and Team Manager interviews would serve as the basis for the development of the job descriptions. The job descriptions may directly reference the information in specific PDQs directly whereas the classification description focused more on referencing broader, overall similarities between multiple positions. Finally, the job descriptions may reflect more than one (1) position if there are multiple positions that perform similar work and have similar qualification requirements.

Career Development Plans

A career development plan is the recommended method to connect an individual's evaluation to personal development and advancement within the agency. SACOG is a dynamic organization, so staff at all levels need to continually grow to be successful in their positions.

Any staff member at SACOG may have a Career Development Plan. It is an optional professional development tool outlining specific career goals and specific objectives to meet those goals.

An initial plan needs approval from the designated Manager to ensure that it is reasonable, and does not make commitments that the agency cannot follow through on (i.e., specific reclassifications without conditions relating to resources and meeting detailed goals).

Human Resources is available to assist anyone in identifying training and career development opportunities to help meet the goals and objectives in the plan. Employees may wish to partner with an internal or external mentor to help with their Career Development Plan, but a mentor is not required.

Section IV – Plan Administration

The Classification Plan will be administered by Human Resources. Classification descriptions shall be made available to employees as a general description of the work performed and to provide a framework of the expectations of job for the employee. The provisions of the Classification Plan are to be observed in the handling of all personnel actions and activities.

Requests for the addition of new positions and classifications and/or reclassification of an existing position should follow the established policies and procedures. A regular employee may request a review of their classification assignment. The requests will be submitted in writing to the employee's primary Team Manager, and must specify the reason the employee believes the classification should be changed. A request for classification review shall be forwarded to the designated Manager for recommendations and to the Chief Operating Officer for decision.

Any decisions related to the addition of new positions and classifications, reclassification of an existing position, and promotion of an existing position will depend on the needs and resources of SACOG and the availability of work, as well as the ability of existing positions to meet the qualifications of and perform the duties of the higher-level class.

Title changes may be recommended and implemented for existing classifications. Typically title changes are recommended to more clearly reflect the level and scope being performed, as well as establish consistency with the labor market and industry standards. Any compensation recommendations are not dependent upon a new title, but upon the market value as defined by job scope, level and responsibilities, and the qualifications required for successful job performance.

Finally, the Classification Plan is not a static, unchanging entity. The Classification Plan will be reviewed on regular, on-going basis and may be amended or revised as required. Amendments or revisions to the Classification Plan will be provided to affected employees.

Appendix I

Classification

Descriptions

ACCOUNTANT

DEFINITION

Under general supervision, performs professional accounting work, including auditing, analyzing, and verifying fiscal records and reports, processing invoices, assisting with budget preparation, and providing information to SACOG staff regarding accounting principles, practices, and procedures; assists in maintaining SACOG's payroll system; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from assigned Team Manager. May be assigned to serve as Team Manager which involves exercising direct and general supervision over assigned team members.

CLASS CHARACTERISTICS

This is a fully competent class that performs the full range of routine to complex accounting and record-keeping functions under general supervision. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of assigned projects, programs, and team(s). Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements, and the methodology used in arriving at the end results are not reviewed in detail. This class is distinguished form the Finance Manager in that the latter has full management and supervisory authority in planning, organizing, and directing the full scope of professional accounting operations within the department.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Provides responsible professional and technical assistance in the administration and implementation of SACOG's financial, auditing, and accounting programs.
- Monitors expenditures, revenues, budget allocations, and contracts to determine project financial status; verifies availability of funds; prepares reimbursement reports as needed; monitors special fund compliance requirements.
- Prepares journal entries and reconciles general ledger and subsidiary accounts related to postings from payroll, accounts payable, cash receipts, and accounts receivable; prepares monthly financial statements, including distributing monthly revenue and expenditure reports to departments; prepares numerous monthly financial reports.
- Analyzes and reconciles expenditure and revenue accounts, including grant billing accounts; reviews funding agreements, sets up tracking spreadsheets, and prepares periodic billings for grants; updates financial information on quarterly discretionary grant reports.
- Prepares financial documents in support of the development and submission of the Overall Work Program (OWP) and amendments.
- Assists in the preparation of annual budgets by analyzing revenue by source and preparing financial budgetary and other budget detail in cooperation with program staff.

- Provides support to the development of the Comprehensive Annual Financial Report (CAFR) including preparing footnotes and accompanying schedules.
- Coordinates with member jurisdictions and auditors on the submission of the State Controller's report including the reconciliation of various transportation plans.
- Assists with annual audits including coordinating Transportation Development Act (TDA) audits.
- Audits claims, vouchers, and purchase orders for fraudulent or improper authorization and other discrepancies; resolves discrepancies where interpretation of guidelines, data or procedures is necessary.
- Reviews and compares journal entries to source documents to ensure accuracy of posted journal.
- Interprets, explains, and applies general and governmental accounting/auditing principles and procedures, laws, and regulations affecting financial operations.
- Evaluates and audits internal controls to ensure accuracy of financial reporting and accounting processes.
- Conducts and monitors financial audits of agencies receiving money through SACOG to determine compliance with fiscal requirements; interprets and evaluates financial reporting requirements.
- Reviews source documents for compliance with rules and regulations; determines proper handling of accounting and technical transactions within designated limits.
- Prepares comprehensive financial and accounting studies, statistics, statements, and reports, including finance and project cost reports and financial statement analyses.
- Responds to requests for information and attempts to resolve them by researching files and records within the scope of authority; refers matters requiring policy interpretation to supervisor for resolution.
- Maintains accurate records and files; develops storage of records and retention schedules.
- Attends meetings, conferences, workshops, and training sessions, and reviews publications to remain current on principles, practices, and new developments in accounting.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Modern principles, practices, and methods of public and governmental accounting and financial analysis, including project/program budgeting and auditing, grants accounting, and the application to agency operations.
- General principles and practices of data processing and its applicability to accounting and public agency operations.
- Professional accounting and auditing standards such as generally accepted accounting principles (GAAP) and generally accepted auditing standards (GAAS).
- Business arithmetic and financial and statistical techniques.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to public agency financial operations.
- Research and reporting methods, techniques, and procedures.
- Technical report writing and preparation of correspondence.
- Record keeping principles and procedures.
- Modern office practices, methods, and computer equipment and applications related to work, including word processing and spreadsheet software.
- English usage, grammar, spelling, vocabulary, and punctuation.

- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, SACOG staff and staff of member agencies in person and over the telephone.

Ability to:

- Analyze financial data and draw sound conclusions.
- Prepare clear, complete, and concise financial statements and reports.
- Review, post, balance, reconcile, and maintain accurate and confidential accounting and financial records.
- Control receipt and disbursal of special funds and grants.
- Analyze, interpret, summarize and present accounting and financial information and data in an effective manner.
- Interpret, apply, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.
- Recommend, develop, and implement work plans and effectively manage programs, projects, and studies.
- Lead assigned team including planning, organizing, directing, coordinating, and evaluating the work of assigned team members.
- Make accurate arithmetic, financial, and statistical computations.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major coursework in accounting, finance, business or public administration, or a closely related field and three (3) years of responsible professional accounting experience, preferably in the public sector.

Licenses and Certifications:

None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel,

reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

The employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, member jurisdictions, external funding agencies, and business representatives in explaining SACOG policies and procedures and requesting and providing information.

EFFECTIVE: October 2015
REVISED:
FLSA: Exempt

ACCOUNTING SPECIALIST

DEFINITION

Under general supervision, performs a variety of accounting support duties in the preparation, maintenance, and processing of accounting records and transactions, including reimbursements, accounts payable, accounts receivable, and grants billing in addition to balancing and maintaining manual and computerized accounting and financial records; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from assigned Team Manager. Exercises no supervision of staff.

CLASS CHARACTERISTICS

This is a fully competent class that performs accounting support work in the following areas: reimbursements, accounts receivable, accounts payable, and grants billing in addition to performing a wide variety of record-keeping, reconciliation, and account support activities. Incumbents perform the full range of technical accounting duties related to SACOG operations within assigned area of responsibility. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise, and are fully aware of the operating procedures and policies of the work unit. Employees are required to be fully trained in all procedures related to assigned area of responsibility. This class is distinguished from the Accountant in that the latter is a professional level requiring completion of a four-year degree.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the rights to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Performs accounting support duties related to processing reimbursements, accounts receivable, accounts payable, and grants billing, including posting, balancing, adjusting, and maintaining manual and computerized account and financial records according to established policies and procedures.
- Processes vendor and contractor invoices, including auditing, verifying, coding, and entering approved invoices and supporting documentation into accounts payable system; ensures invoices are charged to appropriate projects; creates new vendor numbers as needed; researches and resolves discrepancies and vendor inquiries.
- Processes staff, Board, and vendor reimbursements including researching invoices and ensuring proper documentation for reimbursement and compliance with SACOG, County, and state policies and procedures.
- Audits claims and vouchers for accuracy, budget classification, discounts, legality, propriety and compliance with SACOG procedures and contracts according to established guidelines.
- Verifies, posts, and records financial transactions; prepares and maintains databases, records, and reports; generates reports by computer and balances them appropriately.
- Maintains a variety of ledgers, registers, and journals according to established accounting policies and procedures; reconciles transactions and data as directed; records changes and resolves differences; maintains the accuracy of accounting and financial records.

- Receives and balances checks and general ledger deposits; identifies type of payment received and processes accordingly; allocates revenue to proper project/program accounts; posts revenue; prepares bank deposits and related reports.
- Prepares and issues 1099 forms for Board of Directors.
- Reviews accounts to determine accuracy of records; creates routine journal entries and posts in the financial system.
- Responds to requests for information and compiles data for financial reports.
- Maintains check registers and manages cash requirements.
- Sets up new vendor accounts; obtains necessary information and paperwork from vendors; prepares vendor invoice tracking; inputs vendor invoices and prints checks; totals and balances accounts.
- Assists in annual audit, including providing requested files and information.
- Assists in the preparation of monthly, quarterly, and year-end financial reports.
- Utilizes various computer applications and financial system; enters and maintains data; creates spreadsheets and generates reports using the financial system and spreadsheet software; creates documents using word processing software.
- Assists all SACOG staff, contractors, member jurisdictions, and/or vendors by providing answers and information on accounts payable, account information, discrepancies, or general accounting procedures; researches issues regarding specific transactions; resolves discrepancies in an efficient and timely manner; and updates related files on action items.
- Trains and oversees interns and temporary staff in performing accounts payable functions.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Accounting principles and practices for public sector bookkeeping.
- Terminology and practices of financial and account document processing and record-keeping, including accounts receivable and accounts payable.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures.
- Business arithmetic and basic financial and statistical techniques.
- Modern office practices, methods, and computer equipment and applications related to work, including word processing and spreadsheet software.
- Record keeping principles and procedures.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, SACOG staff and staff of member agencies in person and over the telephone.

Ability to:

- Perform detailed account and financial office support work accurately and in a timely manner.
- Interpret, apply, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.
- Make accurate arithmetic and financial computations.
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Organize own work, set priorities, and meet critical time deadlines.

- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to the completion of the twelfth (12^{th}) grade and two (2) years of general accounting and clerical experience. College coursework in accounting and business is desirable.
October 2015

Licenses and Certifications:

None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

The employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, member jurisdictions, external funding agencies, and business representatives in explaining SACOG policies and procedures and requesting and providing information.

EFFECTIVE: October 2015
REVISED:
FLSA: Non-exempt

ADMINISTRATIVE ASSISTANT I
ADMINISTRATIVE ASSISTANT II

DEFINITION

Under general supervision, provides a variety of administrative office support activities, including telephone and front desk reception, word processing, data entry and organization, record-keeping, mail processing, ordering supplies, room reservations, scheduling meetings and maintaining calendars, coordinating building services, database maintenance, and report preparation; provides accurate information to visitors and callers requiring knowledge of SACOG programs, services, policies, and procedures; provides support to assigned Team Managers and staff; performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from assigned Team Manager. Exercises no supervision over staff.

CLASS CHARACTERISTICS

Administrative Assistant I – This is entry-level in the Administrative Assistant class series. Incumbents perform administrative and office support duties, including record-keeping, reserving and setting-up meeting rooms, maintaining calendars, scheduling and coordinating facility, phone system, and office equipment maintenance, screening phone calls, visitors, and mail, and directing questions to the appropriate staff. Incumbents carry out recurring assignments independently without specific instruction, but refer deviations, problems, and unfamiliar situations not covered by instructions and procedures to assigned Team Manager for decision or help. Work fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise and new assignments are reviewed more frequently.

Administrative Assistant II – This is the fully competent level in the Administrative Assistant class series. Incumbents are responsible for performing the full range of administrative and office support duties with a focus on providing committee support by preparing, distributing, and posting agendas and taking and transcribing minutes, researching, compiling, and organizing information from various sources, processing invoices and project billing, and administering team-related projects and programs. Employees at this level are required to be fully trained in all procedures related to the assigned area(s) of responsibility, working with a high degree of independent judgment, tact, and initiative. Incumbents research, select, and apply the most appropriate methods to accomplish assigned tasks and handle problems and deviations in the work assignment in accordance with established policies and procedures. Completed work is usually evaluated for soundness, appropriateness, and conformity to policy and requirements and the methods used in arriving at the end results are not usually reviewed in detail.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Performs administrative office duties to support SACOG operations, including filing, preparing records and reports, creating project files, and preparing and processing invoices.

- Performs general reception duties; receives and screens visitors and telephone calls; takes messages, directs callers and visitors to the proper office or person, and/or provides factual information regarding SACOG programs, projects, activities, and functions; assists in interpreting and applying regulations, policies, procedures, systems, rules, and precedents in response to inquiries and complaints.
- Receives, opens, time stamps, sorts, and distributes all incoming mail, faxes, invoices, and parcels; maintains and processes outgoing mail.
- Composes, types, formats, and proofreads a wide variety of reports, letters, documents, agendas, and memoranda; checks drafts for punctuation, spelling, and grammar; suggests corrections.
- Prepares, copies, collates, and distributes a variety of documents, including agendas packets, reports, informational packets, and contracts and specifications; ensures proper filing of copies in project, program, or central files.
- Coordinates building services including facility, vehicle, phone, and office equipment maintenance; receives, processes, and responds to staff building service requests and safety hazards; conducts regular building services inspections to identify possible safety concerns, hazardous working conditions, and maintenance needs; schedules, coordinates, and facilitates office space moves; maintains and trains staff on use of phone system.
- Maintains staff and room calendars; schedules meetings between SACOG staff and other groups or organizations; arranges for necessary set-up and materials to be available at meetings including audiovisual equipment.
- Monitors inventory of general office equipment and orders additional supplies and equipment based on SACOG needs.
- Maintains vendor relations for ongoing support; receives and reviews proposals and bids from vendors for building services; serves as main point of contact for vendors while on-site and ensures work is completed in a satisfactory manner.
- Performs other duties as assigned.

In addition to the above, Administrative Assistant II:

- Researches, compiles, and organizes information and data for administrative, statistical, and financial reports, such as, but not limited to the Overall Work Program, Comprehensive Annual Financial Report, environmental impact reports, and other reports; checks data; formats reports, spreadsheets, and related documents; prepares and assembles reports, manuals, articles, announcements, and other informational materials.
- Maintains and updates record systems and specialized databases; verifies accuracy of information; enters and updates information with team activity, project files, and report summaries; retrieves information from systems and specialized databases as required.
- Serves as secretary to assigned committees; prepares, posts, and distributes agenda materials including agenda reports, resolutions, and other packet materials; creates, updates, and maintains mailing lists databases; attends meetings and records and transcribes minutes; compiles and arranges materials for mailings.
- Administers team projects and/or programs as assigned including reviewing and processing program applications, creating purchase orders, processing invoices, coordinating program services with external parties, and maintaining program files and databases; provides assistance to team staff on various research and team-related projects; attends events and participates in community outreach efforts in support of SACOG programs.
- Assesses and develops recommendations for organizational or procedural changes affecting support activities; develops standardized templates for agency-wide use; recommends improvements in work flow, procedures, and use of equipment and forms.

QUALIFICATIONS

Knowledge of:

- Modern office practices, methods, and equipment and computer applications related to work, including telephone and audiovisual equipment and word processing and spreadsheet software.
- Principles and practices of building services including facility, phone, and office equipment maintenance.
- Business mathematics techniques.
- Business letter writing and the standard format for reports and correspondence.
- Record keeping principles and procedures.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, SACOG staff and staff of member agencies in person and over the telephone.

Ability to:

- Perform responsible administrative and office support work with accuracy, speed, and general supervision.
- Learn and understand the organization and operation of SACOG as necessary to assume assigned responsibilities.
- Respond to and effectively prioritize multiple phone calls and other requests for service.
- Make accurate mathematical computations.
- Compose correspondence independently or from brief instructions
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, and prudence within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Administrative Assistant II, in addition to the qualifications for the Administrative Assistant I

Knowledge of:

- Organization and function of SACOG, including the role of elected and appointed boards and committees.
- Principles and practices of data collection and report preparation.
- Basic statistical techniques.
- Advanced office practices and methods, as well as use of computer applications.

Ability to:

- Provide varied and responsible office administrative work requiring the use of tact and discretion.
- Research, analyze, and summarize data and prepare accurate reports.
- Make accurate arithmetic, financial, and statistical computations.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner.
- Coordinate and administer special projects and programs as requested.

Education and Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to the completion of the twelfth (12^{th}) grade.

Administrative Assistant I: One (1) year of customer service or clerical office support experience.

Administrative Assistant II: Three (3) years of increasingly responsible clerical, secretarial, or office support experience or two (2) years of experience equivalent to an Administrative Assistant I at SACOG.

Licenses and Certifications:

None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 50 pounds.

ENVIRONMENTAL ELEMENTS

The employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, member jurisdictions, external funding agencies, and business representatives in explaining SACOG policies and procedures and requesting and providing information.

EFFECTIVE: October 2015
REVISED:
FLSA: Non-exempt

ANALYST I
ANALYST II
ASSOCIATE ANALYST
SENIOR ANALYST

DEFINITION

Under general supervision or direction, provides analytical assistance in the administration of assigned operations, programs, and projects in areas such as data services, land use planning, management services, modeling, public information, and transportation planning and programming; researches and analyzes practices and procedures and develops recommendations for organizational, programmatic, policy, and procedural improvements; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Analyst I receives direct supervision from assigned Team Manager. Analyst II and Associate Analyst receive general supervision from assigned Team Manager. Senior Analyst receives general direction from assigned Team Manager.

Associate Analyst and Senior Analyst may be assigned to serve as Team Manager which involves exercising direct and general supervision over assigned team members.

CLASS CHARACTERISTICS

Analyst I – This is the entry-level in the Analyst class series. Initially under close supervision, employees learn to apply concepts and work procedures and methods in assigned area of responsibility to resolve problems of moderate scope and complexity. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. As experience is gained, assignments become more varied and are performed with greater independence.

Analyst II – This is the experienced level in the Analyst class series. Employees in this class provide analytical support to assigned programs, projects, and services on their assigned team(s). Employees conduct studies and analyses and manage projects or programs of a smaller scope, size, budget, duration, and complexity and/or a specific phase of a larger program or project under the guidance an Associate or Senior Analyst. Employees exercise some independent discretion and judgment in selecting and applying work procedures and methods. Assignments and objectives are set for the employee and established work methods are followed. Employees have some flexibility in the selection of steps and timing of work processes.

Associate Analyst – This is the fully competent level in the Analyst class series. Employees independently manage projects or programs; research, analyze, and develop solutions to a wide range of issues; participate in agency planning discussions related to assigned area of responsibility; demonstrate independent judgment in selecting methods and techniques for obtaining solutions; and/or serve as a professional-level resource for data modeling, operational, financial, budgetary, legal, regulatory, political, and/or management analyses and studies which are complex in nature and diverse in scope. Employees at this level have experience that enables them to represent SACOG to the Board, other public agencies, legislators, private and community organizations, regulatory and governmental agencies, and the public. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of assigned projects, programs, and team(s).

Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements, and the methodology used in arriving at the end results are not reviewed in detail.

Senior Analyst – This is the senior level in the Analyst class series. Employees serve as a technical expert in multiple disciplinary and/or programmatic areas using initiative and resourcefulness in deviating from traditional methods or researching trends and patterns to develop new methods, criteria, or proposed new policies and procedures. Employees in this class are typically assigned to manage large, complex, and multi-disciplinary projects, programs, studies, and initiatives that involve contact outside of the agency and the ability to manage multiple stakeholder interests, require a high level of technical expertise and acumen in support of management and/or Board priorities, strategic initiatives, and directives, and are of high visibility and sensitivity to SACOG in areas of its core business initiatives. Employees play a leading role in agency planning discussions related to assigned area of responsibility. The work involves a high-level of problem-solving requiring analysis of unique issues or increasingly complex problems without precedent and/or structure and formulating, presenting, and implementing strategies and recommendations for resolution. Work assignments are typically given as broad, conceptual ideas and directives and incumbents are accountable for overall results and responsible for developing guidelines, action plans, and methods to produce deliverables on time and within budget.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)
Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

These program areas may not be applicable to all positions in this classification. When a position is to be filled, the essential functions will be noted in the announcement of position availability. Functions performed in each program area are briefly described at the fully competent level.

Data Services: Analyzes, designs, programs, and maintains assigned databases; evaluates and analyzes data requirements, designs database infrastructure, and ensures data integrity; makes recommendations for data standardization and normalization. Builds Structured Query Language (SQL) data manipulation scripts to extract data, prepare reports, and provide follow-up information to inquiries. Designs and uses web-based applications and tools. Gathers, digitizes, maintains, analyzes, and interprets transportation, socioeconomic, and Geographic Information System (GIS) data; creates and maintains a variety of maps, tables, and graphical presentations of data.

Land Use Planning: Researches, analyzes, and interprets land use, economic, housing, and demographic data in support of the Metropolitan Transportation Plan/Sustainable Communities Strategy (MTP/SCS) and Blueprint Project. Develops and conducts technical assessments, studies, and written project and program analyses, determines impacts of proposed member jurisdiction projects on the regional resources, develops policies related to mitigation measures, and performs detailed, technical GIS work to complete land use scenario models.

Legislative Affairs: Provides professional support in areas of government relations and legislative affairs programs. Serves as a liaison between SACOG and Federal and State legislators, other government entities, interest groups, and other stakeholders to advance and represent the priorities and interests of SACOG and member jurisdictions. Researches and evaluates the effect of current and pending legislation affecting SACOG; prepares critiques and research papers; recommends and implements policy and procedural changes.

Management Services: Provides professional support to administrative functions of SACOG including human resources, contract administration, grants administration, and budget and financial analysis. Functions as a business partner within the agency while effectively communicating and integrating management services priorities with overall SACOG strategic goals and objectives.

Modeling: Develops, customizes, and maintains transportation, land use, travel demand forecasting, economic, and air quality models to support SACOG's programs and projects. Develops databases, computer programs, scripts, and macros to support and use the models. Collects, organizes, develops, and manages data to test, calibrate, and ensure the consistency, reliability, and validity of the models. Analyzes and interprets model results. Provides training to staff in interpreting and using models.

Public Information: Provides professional support in areas of community relations and outreach, public education, marketing, and media relations programs. Serves as a liaison and builds cooperative partnerships between SACOG and external stakeholders to advance and represent the priorities and interests of SACOG and member jurisdictions. Manages campaigns, events, communication and outreach, and education programs to promote community participation, educate stakeholders, ensure SACOG responsiveness to community concerns, and increase community support for SACOG's interests, programs, and projects.

Transportation: Manages federal, state, and local funds related to transit, transportation, air quality, airport, and economic and environmental sustainability programs, projects, and studies and ensures that all funding requirements are properly executed in order to meet funding requirements. Manages and coordinates both SACOG managed projects, studies, programs and member jurisdiction projects, studies, and programs. Coordinates projects with staff from local governments and regional transit agencies. Researches, identifies, and applies for grants and manages post award funding.

All Positions:

- Performs a variety of professional-level research, planning, administrative, operational, financial, and analytical duties in support of projects, programs, and activities on assigned team(s); conducts studies, research projects, and analyses by selecting, adapting, and applying appropriate analytical, research, and statistical techniques.
- Conducts or participates in studies of new and existing programs and special projects; researches and analyzes operational, fiscal, and technical data and impact to determine feasibility, resolve problems, and increase efficiency; develops program and project scope, descriptions, and implementation plans; consults with SACOG staff, management, and outside agencies; develops recommendations for operational, policy, and/or procedural changes; participates in program and project implementation and monitoring of activities.
- Participates in authoring sections of administrative, management, operational, staff, legal, regulatory, and financial reports including the preparation of conclusions, recommendations, and/or forecasts for management, the Board, and member jurisdictions.
- Attends and represents SACOG in meetings with member jurisdictions and external stakeholders.
- Coordinates assigned projects, programs, and activities with other SACOG projects, programs, and activities as well as with member jurisdictions, external organizations, and the general public.
- Analyzes, interprets and explains SACOG policies and procedures; confers with members of the public to explain procedures and policies; responds to and resolves inquiries and complaints.
- Coordinates, implements, and monitors special projects within assigned area of responsibility.

- Attends and participates in professional group meetings; stays abreast of new trends, technologies, and innovations in the functional area(s) of assignment and issues related to area of assignment.
- Maintains awareness of federal, state, and local regulations and analyzes impact on assigned programs and projects.
- Performs other duties as assigned.

In addition to the above, Associate Analyst:

- Individually or as a Team Manager, manages assigned studies, projects, programs, and initiatives; develops work plans consisting of mission, objectives, scope of work, budget, schedules, baseline requirements, and implementation strategies; identifies strategic, project management, and external issues, recommends solutions, and implements solutions to manage risks and issues.
- Participates in the development and implementation of goals, objectives, policies, and priorities for assigned projects, programs, and studies; participates in agency planning and coordination discussions related to assigned area of responsibility; researches, implements, and administers policies and procedures.
- Authors administrative, management, operational, staff, legal, regulatory, and financial reports including the preparation of conclusions, recommendations, and forecasts for management, the Board, and member jurisdictions; develops formats to facilitate clear understanding and interpretation of information and materials to be presented.
- Develops consultant requests for proposals for professional services and administers the advertising and bid processes; evaluates proposals and recommends project award; negotiates contracts and agreements and administers same after award.
- Makes presentations to the public, community groups, various committees, and elected boards.
- Represents SACOG on committees and task forces to develop, implement, and monitor programs and projects that impact SACOG and its member jurisdictions.

In addition to the above, Senior Analyst:

- Provides leadership and technical guidance as an agency-recognized subject matter expert and advisor in multiple disciplines and/or programmatic areas using initiative and resourcefulness in deviating from traditional methods and analyzing unique issues or problems without precedent and/or structure; researches trends and patterns to develop new standards, models, methods, criteria, or proposed new policies and procedures related to assigned area of responsibility; oversees quality assurance and quality control activities within areas of expertise.
- Manages large, complex, and multi-disciplinary projects, programs, studies, and initiatives involving the highest level of technical complexity, numerous contacts with high-level managers and officials both inside and outside of SACOG, and are of high visibility to SACOG in the area of its core business initiatives.
- Develops agency-wide standards for projects, programs, and studies including methodology, deliverable templates, and performance measurements; leads agency planning related to assigned area of responsibility.
- Provides expert consultation to meet user needs including recommending, designing, and coordinating both changes to business practices and specific technology solutions.
- Leads and participates in internal and interagency technical work groups as a technical expert to gather information for policy and decision making and to advance and represent the priorities and interests of SACOG and member jurisdictions.

- Interprets SACOG's business needs and identifies and analyzes critical issues; recommends solutions and resolves complex problems; develops new processes and procedures to meet requirements and anticipated changes; advises staff and management on changes.

QUALIFICATIONS

Analyst I

Knowledge of:

- Principles, practices, concepts, theories, research methods, and sources of information related to assigned area of responsibility.
- Record keeping principles and procedures.
- Modern office practices, methods, and computer equipment and applications related to the work.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and SACOG staff.

Ability to:

- Learn and apply federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Learn to apply techniques of conducting analytical studies, evaluating alternatives, making sound recommendations, and preparing and presenting effective and technical reports.
- Learn to research, analyze, interpret, summarize, and present technical information and data in an effective manner.
- Prepare clear and effective reports, correspondence, and other written material.
- Make accurate arithmetic, financial, and statistical computations.
- Organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, and prudence within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Analyst II, in addition to the qualifications for the Analyst I

Knowledge of:

- Principles and techniques of conducting analytical studies, evaluating alternatives, making sound recommendations, and preparing and presenting effective and technical reports.
- Recent and on-going developments, current literature, and sources of information related to assigned programs, projects, and services.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.

Ability to:

- Implement assigned programs, projects, and activities in an independent and cooperative manner, evaluate alternatives, make sound recommendations, and prepare effective technical reports.
- Research, analyze, interpret, summarize, and present technical information and data in an effective manner.
- Interpret, apply, explain, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.
- Use independent judgment within general policy, procedural, and legal guidelines.

Associate Analyst, in addition to the qualifications for the Analyst II

Knowledge of:

- Advanced principles, practices, concepts, and theories of assigned area of responsibility.
- Principles and practices of project and team management, including developing and implementing goals, objectives, scope of work, schedule, and budget and funding allocation.
- Techniques for effectively representing SACOG in contacts with governmental agencies, community groups, various business, professional, educational, and regulatory organizations, and the public.

Ability to:

- Recommend, develop, and implement work plans and effectively manage programs, projects, and studies.
- Lead assigned team including planning, organizing, directing, coordinating, and evaluating the work of assigned team members.
- Effectively represent the team and SACOG in meetings with the Board, member jurisdictions, governmental agencies, community groups, and various businesses, professional, and regulatory organizations and in meetings with individuals.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner.

Senior Analyst, in addition to the qualifications for the Associate Analyst

Knowledge of:

- Expert-level theories and concepts related to assigned area of responsibility.
- Quality assurance and quality control principles and practices of within areas of expertise.
- Organizational and management practices as applied to the analysis, evaluation, development, and implementation of programs, policies, and procedures.

Ability to:

- Provide leadership and technical guidance as an agency-recognized subject matter expert and advisor in assigned area of responsibility including performing varied duties requiring many different and unrelated processes and methods applied to a broad range of activities or substantial depth of analysis.
- Manage large, complex, and multi-disciplinary projects, programs, studies, and initiative.
- Make effective decisions under circumstances that may include uncertainty in approach, methodology, or interpretation and evaluation processes, as well as continuing changes in program, technological developments, unknown phenomena, or conflicting requirements.

- Originate new techniques and establish standards by identifying and defining unknown conditions, resolving critical problems, and developing new theories.

Education and/or Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major coursework in business or public administration, planning, political science, finance, management information systems, computer science, or a closely related field.

Analyst I: Some professional administrative, planning, operational, management, or financial analysis experience is desirable.

Analyst II: At least one (1) year of increasingly responsible experience performing administrative, planning, operational, management, or financial research and analysis in a field closely related to area of assignment or two (2) years of experience equivalent to an Analyst I at SACOG.

Associate Analyst: At least three (3) years of increasingly responsible experience performing administrative, planning, operational, management, or financial research and analysis in a field closely related to area of assignment or two (2) years of experience equivalent to an Analyst II at SACOG.

Senior Analyst: At least five (5) years of increasingly responsible experience performing administrative, planning, operational, management, or financial research analysis in a field closely related to area of assignment or two (2) years of experience equivalent to Associate Analyst at SACOG.

Licenses and Certifications:

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

This is primarily a sedentary classification and the employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, other agency representatives, member jurisdictions, government officials, business representatives, and the general public in explaining SACOG policies and requesting and providing information.

EFFECTIVE: October 2015
REVISED:
FLSA: Analyst I/II: Non-exempt
Associate Analyst and Senior Analyst: Exempt

CLERK OF THE BOARD

DEFINITION

Under general direction, plans, supervises, and participates in the daily operations and activities of SACOG's Board services functions, including serving as Clerk of the Board and overseeing public records; performs a variety of complex office administrative, secretarial, and clerical duties in support of the Chief Executive Officer and related staff; coordinates assigned activities with those of other teams; and performs other duties as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from assigned Team Manager. As a Team Manager exercises direct and general supervision over assigned team members.

CLASS CHARACTERISTICS

This is a single-position classification that is responsible for overseeing the daily operations of SACOG's Board services functions. The position performs a variety of management and administrative duties, including overseeing the development of Board agenda packets, administration of filings, and records management and performing specialized, confidential, and technical office support duties in support of the Chief Executive Officer to ensure efficient service provision. The work requires recommending and implementing office policies, procedures, and regulations and involves performing various research and administrative support functions.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Assumes full responsibility for all programs, services, and activities of Board services functions.
- Trains, motivates, and directs team personnel; evaluates and reviews work for acceptability and conformance with agency standards, including priorities and performance evaluations; provides or coordinates staff training; works with employees on performance issues; responds to staff questions and concerns.
- Develops and implements goals, objectives, policies, and priorities for assigned functions; recommends and administers policies and procedures.
- Monitors operations and activities of assigned functions; recommends improvements and modifications and prepares various reports on operations and activities.
- Attends all regular and standing Board meetings; records all official proceedings; prepares public notifications, agendas, minutes, and other documents; certifies resolutions, agreements, actions, and other official documents; publishes, files, and indexes all proceedings of the Board of Directors.
- Provides highly responsible and complex administrative support to the Board of Directors.
- Provides information to the public to ensure an understanding of SACOG policies and procedures; listens to questions and explains procedures according to existing guidelines; refers callers to the appropriate team source as appropriate; identifies, negotiates, and/or resolves solutions to caller complaints and problems when appropriate.

- Composes, types, and edits a variety of documents including detailed and often confidential correspondence, forms, memos, reports, statistical reports, and specialized documents for the Chief Executive Officer and other management staff; proofreads materials for accuracy, completeness, compliance with SACOG policies, format, and English usage, including grammar, punctuation, and spelling.
- Maintains calendars and makes meeting arrangements for Board Members; arranges for necessary set-up and materials to be available at meetings.
- Coordinates travel arrangements and accommodations for Board Members; completes expense reports and reimbursements and submits all related paperwork.
- Administers the public hearing process for Board meetings; coordinates development of public hearing packets and public notices of hearings in accordance with various government code requirements and legal deadlines.
- Administers the records management program; ensures legal compliance with retention schedules; develops and updates records retention policies and procedures; researches SACOG documents, historical information, and other information as needed; ensures proper destruction of records; attests, indexes, and files all legislative actions.
- Ensures compliance with the Public Records Act, the Freedom of Information Act, and the Ralph M. Brown Act; reviews and monitors legal requests for records; ensures that all public records are open to inspection at all times during office hours and that every person's right to inspect any public record of SACOG is upheld.
- Develops and implements Board education and engagement activities as well as maintaining Board relationships, developing Board communications, providing support to the Board Chair and Vice Chair, and serving as a liaison for the Board regarding requests for information and assistance.
- Advises management on Board concerns, requests for information, and communications; provides summary updates of direct communications with Board members.
- Develops annual Board engagement calendar including coordinating with Board members, management, and staff on agenda content, presentations, regional activities, other meetings.
- Organizes and carries out administrative assignments; researches, compiles, and organizes information and data from various sources on specialized topics related to programs in assigned area.
- Attends and participates in professional group meetings and committees; stays abreast of new trends and innovations related to assigned functions.
- Monitors changes in laws, regulations, and technology that may affect SACOG operations; implements policy and procedural changes as required.
- Performs other special projects or duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles and practices, including goal setting, program development, implementation, and evaluation, and supervision of staff.
- Principles, practices, and procedures related to public agency record-keeping and the Clerk function.
- Principles, practices, and procedures related to office management and support services.
- Records management principles and practices, including legal requirements for recording, retention, storage, and disclosure.
- Organization and function of public agencies, including the role of an elected Board and appointed committees and boards.

- Applicable federal, state, and local laws, rules, regulations, and organizational policies and procedures relevant to assigned area of responsibility.
- Research and reporting methods, techniques, and procedures.
- Technical report writing and preparation of correspondence.
- Principles and practices of data collection and report preparation.
- Modern office practices, methods, and computer equipment and computer applications related to work.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and SACOG staff.

Ability to:

- Develop and implement goals, objectives, policies, procedures, work standards, and internal controls for assigned program areas.
- Perform responsible administrative support work with accuracy, speed, and general supervision.
- Provide varied and responsible office administrative work requiring the use of tact and discretion.
- Oversee and coordinate maintenance of the official records of SACOG.
- Prepare official minutes, resolutions, clear and concise reports, correspondence, policies, procedures, and other written materials.
- Interpret, apply, explain, and ensure compliance with federal, state, and local laws, rules, regulations, policies, and procedures.
- Plan, organize, direct, and coordinate the work of assigned staff; delegate authority and responsibility; select, train, motivate, and evaluate the work of staff.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Conduct complex research projects, evaluate alternatives, make sound recommendations, and prepare effective technical staff reports.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate office equipment and computer applications related to the work.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major coursework in public or business administration or a closely related field and five (5) years of broad and progressively responsible experience in administrative services, records management, and related areas, including three (3) years of supervisory experience.

Licenses and Certifications:

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various SACOG meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

This is primarily a sedentary classification and the employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, other agency representatives, member jurisdictions, government officials, business representatives, and the general public in explaining SACOG policies and requesting and providing information.

EFFECTIVE: April 19, 2018
REVISED:
FLSA: Exempt

DEPUTY EXECUTIVE DIRECTOR

DEFINITION

Under administrative and policy direction, incumbents are accountable for accomplishing agency-wide planning and operational goals and objectives within legal and general policy and regulatory guidelines. Incumbents are responsible for the efficient and economical performance of the organization's operations, including coordinating services and activities among SACOG staff, the Board of Directors, advisory committees, member agencies, partner organizations. Incumbents also provide highly responsible and complex executive support to the Chief Executive Officer.
Performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Has administrative responsibility for organizational programs, projects, and operations and reports to the Chief Executive Officer. Provides supervision to executives, management, supervisory, professional, technical, and administrative support staff, either directly or through subordinates.

CLASS CHARACTERISTICS

This is an executive management classification that oversees, directs, and participates in all activities of SACOG's operations, including enforcement of all SACOG policies and procedures and local, state, and federal regulations, the conduct of all financial activities, and the efficient and economical performance of SACOG's operations.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

These functions may not be present in all positions in this classification. When a position is to be filled, the essential functions will be noted in the announcement of position availability. Functions performed in two illustrative Deputy Executive Director positions are described below.

Deputy Executive Director for Operations: Lead on the administration of all aspects of the organization's operations, including finance, legal, compliance, human resources, information technology, administrative support, board support, and procurement and contracting.

Deputy Executive Director for Planning & Programs: Lead on the administration of all aspects of the organization's programmatic work, including data and analysis, planning, legislative affairs, modeling, communications, and transportation services.

All Positions:

- Assumes executive responsibility and leadership in assigned activities of SACOG's operations.
- Coordinate with Chief Executive Officer and other Deputy Executive Directors to formulate appropriate policies and strategies, both at the Board of Directors and administrative levels.
- Serves as Acting Chief Executive Officer as delegated by the Chief Executive Officer.
- Maintains ongoing communication, collaboration, and coordination with Chief Executive Officer and others in SACOG management to promote the development of systems and policies to improve service delivery and SACOG management; provides leadership in decision making, conflict resolution and team building.
- Provides support and consultation to subordinate managers to ensure key responsibilities are fulfilled including compliance with state and federal regulations; implementation of SACOG's goals; sound fiscal management; effective use of technology, facilities and equipment; and responsive human resources programs.
- Participates in board-, executive-, and management-level discussions providing input on the formulation and implementation of the goals, policies, and directives of the Board of Directors; provides input on project and program issues, policy, and strategic direction.
- Conducts special projects assigned by the Chief Executive Officer that may include research and policy development, implementation of specific programs or projects, and/or assisting staff in the implementation of their programs and projects.
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- Develops and directs the development and implementation of goals, objectives, policies, procedures, and work standards for the assigned activities.
- Selects, trains, motivates, and directs personnel; evaluates and reviews work for acceptability and conformance with SACOG standards; works with employees on performance issues; implements discipline and termination procedures; responds to staff questions and concerns.
- Directs, plans, manages, and participates in the development and administration of SACOG's budget; directs the forecast of additional funds needed for staffing, equipment, materials, and supplies; directs the monitoring of and approves expenditures; directs and implements adjustments as necessary.
- Oversees the overall quality of the assigned areas of responsibility by directing, planning, developing, reviewing, and implementing policies and procedures to meet legal requirements and SACOG's needs; continuously monitors and evaluates the efficiency and effectiveness of service delivery methods and procedures; assesses and monitors the distribution of work, support systems, and internal reporting relationships; identifies opportunities for improvement; directs the implementation of change.
- Advises Chief Executive Officer and other Deputy Executive Directors, and consultants on and provides strategic input, data and analysis, and technical oversight for assigned areas of resonsponsbility.
- Oversee the preparation of Board of Directors and its committees' agendas; ensure board members are adequately briefed prior to meetings; ensure adequate support for the conduct of meetings.
- Oversees the development of consultant requests for proposals for professional services and the advertising and bid processes; evaluates proposals and recommends project award; coordinates with legal counsel to determine SACOG's needs and requirements for contractual services; negotiates contracts and agreements and administers same after award.
- Represents SACOG, including on behalf of the Chief Executive Officer in state and regional meetings and serves as a liaison with local agencies, elected officials, outside agencies, and the public; oversees and makes presentations to the public, community groups, various committees, elected boards, and the SACOG Board of Directors.

- Prepares, reviews, and presents staff reports, various management and information updates, and reports on special projects as assigned by the Chief Executive Officer and Board of Directors.
- Monitors changes in laws, regulations, and technology that may affect SACOG or team operations and programs; implements policy and procedural changes as required.
- Responds to public inquiries and complaints and assists with resolutions and alternative recommendations.
- Participate on a variety of committees and task forces; attend and participate in professional group meetings; stay abreast of new trends and innovations in the field of regional governance.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Administrative principles and practices, including goal setting and program development, implementation, and evaluation.
- Principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures.
- Budget development, contract administration, administrative practices, and general principles of risk management related to the functions of the assigned areas.
- Organizational and management practices as applied to the analysis and evaluation of projects, programs, policies, procedures, and operational needs.
- Principles and practices of assigned areas of responsibility.
- Recent and on-going developments, current literature, and sources of information related to assigned programs and services, including issues affecting the Sacramento region related to program areas managed by SACOG, as well as the general issues affecting SACOG's member organizations.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned areas of responsibility.
- Record keeping principles and procedures.
- Modern office practices, methods, and computer equipment and applications related to the work.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing SACOG in contacts with governmental agencies, community groups, various business, professional, educational, and regulatory organizations, and the public.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and SACOG staff.

Ability to:

- Develop and implement goals, objectives, policies, procedures, work standards, and internal controls for the team and assigned activities.
- Provide administrative and professional leadership and direction for assigned activities.
- Develop, plan, coordinate, and implement a variety of assigned activities suited to the needs of the community and SACOG.
- Conduct complex research projects, evaluate alternatives, make sound recommendations, and prepare effective technical reports.

- Effectively represent the team and SACOG in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Prepare and administer SACOG budget and Overall Work Program; allocate limited resources in a cost-effective manner.
- Interpret, apply, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.
- Deal with the Board of Directors, elected officials, government agencies, and other outside agencies, and the public to advance and represent the priorities and interests of SACOG and member jurisdictions, provide policy direction, and/or negotiate solutions to difficult problems.
- Plan, organize, direct, and coordinate the work of team staff; delegate authority and responsibility.
- Select, train, motivate, and evaluate the work of staff and train staff in work procedures.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Prepare clear and concise reports, correspondence, policies, procedures, and other written materials.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major coursework in assigned area of responsibility and ten (10) years of broad and progressively responsible program management experience including at least five (5) years of supervisory experience.

Licenses and Certifications:

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various SACOG meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

The employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, member jurisdictions, government officials, community representatives, and the general public in explaining SACOG policies and requesting and providing information.

EFFECTIVE: October 22, 2018
REVISED:
FLSA: Exempt

EXECUTIVE ASSISTANT

DEFINITION

Under general direction, plans, supervises, and participates in the daily operations and activities of SACOG's administrative office support, including overseeing office support services; performs a variety of complex office administrative, secretarial, and clerical duties in support of the Chief Executive Officer and related staff; coordinates assigned activities with those of other teams; and performs other duties as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from assigned Team Manager. As a Team Manager exercises direct and general supervision over assigned team members.

CLASS CHARACTERISTICS

This is a single-position classification that is responsible for overseeing the daily operations of SACOG's administrative office support functions. The position performs a variety of management and administrative duties, including performing specialized, confidential, and technical office support duties in support of the Chief Executive Officer to ensure efficient service provision. The work requires recommending and implementing office policies, procedures, and regulations and involves performing various research and administrative support functions.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Assumes full responsibility for all programs, services, and activities of administrative office support functions.
- Trains, motivates, and directs team personnel; evaluates and reviews work for acceptability and conformance with agency standards, including priorities and performance evaluations; provides or coordinates staff training; works with employees on performance issues; responds to staff questions and concerns.
- Develops and implements goals, objectives, policies, and priorities for assigned functions; recommends and administers policies and procedures.
- Monitors operations and activities of assigned functions; recommends improvements and modifications and prepares various reports on operations and activities.
- Provides highly responsible and complex administrative support to the Chief Executive Officer.
- Receives and screens visitors, telephone calls, emails, and regular mail; provides information to the public to ensure an understanding of SACOG policies and procedures; listens to questions and explains procedures according to existing guidelines; refers callers to the appropriate team source as appropriate; identifies, negotiates, and/or resolves solutions to caller complaints and problems when appropriate.
- Composes, types, and edits a variety of documents including detailed and often confidential correspondence, forms, memos, reports, statistical reports, and specialized documents for the Chief Executive Officer and other management staff; proofreads materials for accuracy,

completeness, compliance with SACOG policies, format, and English usage, including grammar, punctuation, and spelling.
- Maintains calendars and makes meeting arrangements for the Chief Executive Officer; arranges for necessary set-up and materials to be available at meetings.
- Coordinates travel arrangements and accommodations for Chief Executive Officer; completes expense reports and reimbursements and submits all related paperwork.
- Organizes and carries out administrative assignments; researches, compiles, and organizes information and data from various sources on specialized topics related to programs in assigned area.
- Oversees the maintenance and operation of office systems, including purchase of supplies and equipment.
- Attends and participates in professional group meetings and committees; stays abreast of new trends and innovations related to assigned functions.
- Monitors changes in laws, regulations, and technology that may affect SACOG operations; implements policy and procedural changes as required.
- Performs other special projects or duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles and practices, including goal setting, program development, implementation, and evaluation, and supervision of staff.
- Principles, practices, and procedures related to office management and support services.
- Organization and function of public agencies, including the role of an elected Board and appointed committees and boards.
- Applicable federal, state, and local laws, rules, regulations, and organizational policies and procedures relevant to assigned area of responsibility.
- Research and reporting methods, techniques, and procedures.
- Technical report writing and preparation of correspondence.
- Principles and practices of data collection and report preparation.
- Modern office practices, methods, and computer equipment and computer applications related to work.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and SACOG staff.

Ability to:

- Develop and implement goals, objectives, policies, procedures, work standards, and internal controls for assigned program areas.
- Perform responsible administrative support work with accuracy, speed, and general supervision.
- Provide varied and responsible office administrative work requiring the use of tact and discretion.
- Interpret, apply, explain, and ensure compliance with federal, state, and local laws, rules, regulations, policies, and procedures.
- Plan, organize, direct, and coordinate the work of assigned staff; delegate authority and responsibility; select, train, motivate, and evaluate the work of staff.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.

- Conduct complex research projects, evaluate alternatives, make sound recommendations, and prepare effective technical staff reports.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate office equipment and computer applications related to the work.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major coursework in public or business administration or a closely related field and five (5) years of broad and progressively responsible experience in administrative services and related areas, including three (3) years of supervisory experience.

Licenses and Certifications:

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various SACOG meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

This is primarily a sedentary classification and the employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, other agency representatives, member jurisdictions, government officials, business representatives, and the general public in explaining SACOG policies and requesting and providing information.

EFFECTIVE: October 22, 2015
REVISED: April 19, 2018
FLSA: Exempt

GRAPHIC DESIGNER

DEFINITION

Under general supervision, performs professional and technical duties related to the conceptualization, design, development, production, printing, and/or web-posting of a variety of publications, brochures, signage, models, exhibits, charts, graphics, descriptive drawings, and audio visual presentations related to SACOG projects and programs; participates in website design; translates abstract ideas into viable formats for various projects, works closely with marketing staff on determining product requirements; refines conceptual graphic design ideas into workable project plans; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from assigned Team Manager. Exercises no supervision over staff.

CLASS CHARACTERISTICS

This is a fully competent class responsible for performing specialized functions in the development and support of SACOG's image and public outreach and education efforts, including designing and developing member outreach and education materials related to all SACOG projects and programs. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of assigned projects, programs, and team(s). Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements, and the methodology used in arriving at the end results are not reviewed in detail.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Works with staff in researching, planning, designing, producing, presenting, and evaluating a variety of outreach and educational materials to market and build SACOG's image and educate the community on SACOG projects, programs, and initiatives.
- Assists in developing brand identities and supporting collateral for SACOG programs and projects; conceptualizes and prepares preliminary designs through final products and translates abstract ideas into viable formats for various design products.
- Performs complex graphic art tasks for SACOG publications and campaigns, including determining graphic content, images, and cover art, designing and creating artwork, taking photographs and preparing layout designs, determining the most appropriate medium (i.e., electronic, paper, or both) to reach the targeted audience, presenting to team staff for review, and revising and finalizing projects.
- Coordinates with the Team Managers and staff in developing ideas; produces graphic materials in support of projects and programs; designs layouts; acquires cost estimates and establishes schedules for production of materials; ensures quality, budget, and time requirements are met.

- Coordinates with printers and other vendors on individual publications, cost estimates, press time, reproduction problems, materials, and ensures monetary and quality control.
- Creates, edits, and proofreads text, as necessary, to ensure accurate and effective communication.
- Assists with the update and maintenance of web site design and usability by identifying and developing new material, reviewing requests for changes from teams, aligning design and content with SACOG marketing plan, and ensuring consistency of information architecture and graphical user interface.
- Receives and transfers files including Board and committee agendas; converts PDF agendas to HTML; sends agendas out to mailing list.
- Works in collaboration with staff to produce a variety of informational and instructional video, audio, media, and broadcast products, including gathering data and conducting interviews, developing ideas, creating content, and scripts, determining shoot locations and production schedule, shooting videos, recording voice over, and editing.
- Performs post-production of videos including creating and inserting graphics, making audio adjustments, rendering videos, final editing, and posting the videos to appropriate websites.
- Attends and records Board of Director meetings and posts videos to appropriate websites.
- Takes and prints photographs for Board member portraits and at special events.
- Utilizes a wide range of software programs and computer hardware in order to successfully complete projects.
- Attends seminars and training courses to stay abreast of current trends, processes, software, and updates on graphic computer software packages; reads trade publications; meets with vendors to stay informed of the latest developments in the fields of graphic arts, web, and photography.
- Archives and retrieves a variety of original artwork, forms, designs, and supplies.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Graphic art and design concepts, processes, and procedures, including illustration of various media, form design, reproduction, layout, and camera processes.
- Typography, pre-press production and color correction, and printing processes and technology.
- Fundamentals of photography, including in studio and candid settings and post-production enhancements and corrections.
- Web design and layout, including graphical user interface and information architecture principles.
- Production techniques and procedures for video, audio, media, and broadcast production and post-production, including editing, copywriting, development of production schedules, voice acting, master control operation, and audio/video processing.
- Copyright laws, rules, and regulations.
- Principles and practices of data collection and creative content development, editing, and recording, and publication.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Record keeping principles and procedures.
- Modern office practices, methods, and computer equipment and applications related to work, including word processing and spreadsheet software.
- English usage, grammar, spelling, vocabulary, and punctuation.

- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, SACOG staff and staff of member agencies in person and over the telephone.

Ability to:

- Creatively design effective educational and informational materials relating to SACOG programs, projects, events, services, and activities.
- Visualize abstract ideas and concepts; graphically transpose ideas and thoughts onto paper or computer screen.
- Produce neat, accurate, and quality line work and design.
- Produce original video, audio, media, and broadcast production in support of SACOG programs and projects.
- Gather data and creatively develop, plan, and translate concepts into visual and audio form.
- Manage projects while meeting time deadlines and staying within budgets as assigned.
- Understand the organization and operation of SACOG as necessary to assume assigned responsibilities.
- Respond to and effectively prioritize requests for service.
- Identify and implement effective course of action to complete assigned work.
- Collect, interpret, summarize, and present information in an effective manner.
- Prepare scripts, correspondence, and other written materials.
- Maintain accurate logs, records, and basic written records of work performed.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major coursework in graphic design, communications, marketing, business or public administration, or a closely related field and three (3) years of increasingly responsible experience in graphic design, web design, and the development of public education programs and materials.

Licenses and Certifications:

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger

dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

The employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, member jurisdictions, community representatives, and the general public in explaining SACOG policies and requesting and providing information.

EFFECTIVE: October 2015
REVISED:
FLSA: Exempt

INFORMATION TECHNOLOGY ADMINISTRATOR

DEFINITION

Under general supervision, provides technical support for implementing, troubleshooting, maintaining, and monitoring SACOG's information technology systems and infrastructure; provides technical support to users; configures and maintains network and server infrastructure; assesses user training needs and trains users in effective use of applications and equipment; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from assigned Team Manager. May be assigned to serve as Team Manager which involves exercising direct and general supervision over assigned team members.

CLASS CHARACTERISTICS

This is a fully competent class that plans, develops, and implements SACOG information systems programs and functions, including hardware, operating systems, and desktop/network applications. Incumbents serve as a professional-level resource related to information technology programs and services; research, analyze, and develop solutions to a wide range of issues; and demonstrate independent judgment in selecting methods and techniques for obtaining solutions. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of assigned projects, programs, and team(s). Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements, and the methodology used in arriving at the end results are not reviewed in detail.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Plans and participates in the operations and activities of SACOG's information technology support functions, including the installing, upgrading, and maintaining personal computers, network systems and security, server infrastructure, and required hardware.
- Implements and upgrades the network and server infrastructure to accommodate agency needs and comply with security policies, regulations, and guidelines; works with staff to maintain, revise, or improve network systems and server infrastructure.
- Ensures the functionality and operational stability of systems; monitors system performance; optimizes and tunes operating systems to resolve performance issues; troubleshoots network connectivity problems.
- Installs, configures, and maintains all network hardware, software, peripherals, and devices, including switches, routers, interfaces, wireless access points, servers, and firewalls, for functionality and security.
- Implements, monitors, and maintains security control for information technology systems and databases; verifies and ensures proper user accessibility; identifies and addresses vulnerabilities; researches, recommends, and applies security updates as needed.

- Installs, configures, and maintains servers in VMware environment; diagnoses and solves technical and operational problems, working with vendors as needed.
- Installs, designs, configures, maintains, and upgrades operating systems and software packages across disparate platforms.
- Creates email boxes for users and teams; troubleshoots email servers, connection, access, security, firewall, and storage issues; monitors email servers and performs scheduled maintenance; sets up, supports and troubleshoots problems with synching email to smart devices.
- Maintains electronic communication systems and equipment, such as telecommunications and audiovisual equipment.
- Implements system enhancements to improve the performance and reliability of the system; researches, recommends, tests, and implements upgrades and fixes as needed.
- Serves as a technical resource for maintaining, enhancing, and upgrading SACOG's current and long-term computer system operations.
- Assists in developing consultant requests for proposals for professional services and administering the bid processes; participates in evaluating proposals and recommending project award; participates in negotiating contracts and agreements and administers same after award.
- Assists in the development and administration of SACOG's information technology budget; forecasts additional funds needed for equipment, materials, and supplies; monitors the approved budget.
- Orders and maintains inventory, tracks and receives a variety of computer systems and telecommunications equipment, software applications supplies, training materials, and related needs adhering to established purchasing policies.
- Develops and recommends comprehensive standards, policies, procedures, and technical documentation pertaining to information technology application and system maintenance and infrastructure.
- Attends and participates in professional group meetings; stays abreast of new trends and innovations in technology related to SACOG operations; researches, recommends, and evaluates vendor solutions and technologies; implements improvements; works with staff to maintain, revise, or improve operations and systems.
- Authors and maintains user and technical operating manuals, procedures, and documentation; provides training to users and other technical staff and advises on best practices.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles, practices, and methods of administering a comprehensive information systems and telecommunications support program.
- Principles and practices used in the operation, troubleshooting, maintenance, and administration of network operating, personal computer hardware and software, and telecommunications systems.
- Techniques and methods of network, server, and computer hardware and software evaluation, configuration, installation, and documentation.
- Network and infrastructure configuration, installation, and maintenance methods and techniques.
- Principles and practices of maintaining virtualization technologies, using system monitoring tools, and configuring and implementing system backup solutions
- Principles and practices of budget development, administration, and accountability.

- Recent and on-going developments, current literature, and sources of information related to information technology and telecommunications support programs.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Technical report writing practices and procedures.
- Modern office practices, and methods.
- Principles and procedures of record keeping and reporting.
- English usage, spelling, vocabulary, grammar, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and SACOG staff.

Ability to:

- Implement a comprehensive information technology and telecommunications support program suited to meet the needs of SACOG.
- Analyze, diagnose, and troubleshoot information technology networks, servers, and systems and workstation hardware and software using logic to solve problems.
- Install, maintain, configure, and troubleshoot a variety of information technology software and hardware equipment and peripherals.
- Perform analyses of informational requirements and needs; identify, evaluate, and solve information technology problems; implement new or revised systems and procedures; provide technical advice and consultation, and ensure efficient computer system utilization.
- Establish and maintain a computer maintenance schedule.
- Prepare and administer assigned budget; allocate limited resources in a cost effective manner.
- Interpret, apply, and explain applicable federal, state, and local policies, procedures, laws and regulations.
- Prepare clear and concise system documentation, user policies and procedures, and other written materials.
- Deal tactfully with staff in providing information, answering questions, and providing customer service.
- Lead assigned team including planning, organizing, directing, coordinating, and evaluating the work of assigned team members.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment, including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone or radio, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major coursework in computer science, information technology, or a related field and four (4) years of

progressively responsible experience in computer systems, network management, or related experience.

Licenses and Certifications:

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 90 pounds with the use appropriate use of equipment.

ENVIRONMENTAL ELEMENTS

This is primarily a sedentary classification and the employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, other agency representatives, member jurisdictions, business representatives, and the general public in explaining SACOG policies and requesting and providing information.

EFFECTIVE: October 2015
REVISED:
FLSA: Exempt

MANAGER

DEFINITION

Under general direction, plans, organizes, manages, and provides oversight of assigned teams, programs, and projects; recommends and implements policies, procedures, and practices; coordinates assigned activities with those of other teams; provides highly responsible and complex professional assistance to the Deputy Executive Director(s) in areas of expertise; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from Deputy Executive Director(s). As a Team Manager exercises direct and general supervision over assigned team members.

CLASS CHARACTERISTICS

This is a management classification that manages all activities related to assigned teams, programs, and projects including short- and long-term planning and development and administration of team policies, procedures, and services. This class provides assistance to the Deputy Executive Director(s) in a variety of administrative, coordinative, analytical, and liaison capacities. Successful performance of the work requires knowledge of public policy, SACOG functions and activities, and the ability to develop, oversee, and implement multiple programs, projects, and services in assigned area of responsibility. Responsibilities include coordinating the activities of assigned teams with those of other teams and outside agencies and managing and overseeing the complex and varied functions of assigned teams. The incumbent is accountable for accomplishing team planning and operational goals and objectives and for furthering SACOG goals and objectives within general policy guidelines.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

These functions may not be present in all positions in this classification. When a position is to be filled, the essential functions will be noted in the announcement of position availability.

Data Modeling: Pans, organizes, manages, and provides oversight of the development and implementation of SACOG's regional travel demand model (TDM), including managing the use of TDM for SACOG sponsored projects and member jurisdiction projects and forecasting studies and analyses. Works closely with SACOG staff and other governmental and regional agencies to collect and maintain data for SACOG's regional TDM and Base Year Update.

Data Services: Oversees and manages the administration and maintenance of the information technology infrastructure, systems, and databases and Geographic Information Systems program; develops long-term strategies to plan for upgrades and growth; and encourages innovation among technical staff in the utilization and implementation of ideas and techniques. Updates and maintains the IT Master Plan. Provides strategic advice on evaluation, selection,

implementation, and maintenance of information systems and ensures appropriate investment in operational systems.

External Affairs/Member Services: Serves as a liaison and builds coalitions between SACOG and key external stakeholders in order to advance the priorities and interests of SACOG and member jurisdictions; recommends SACOG participation in key regional activities. Evaluates membership services and assists with the implementation of procedural and/or service changes after approval. Researches best practices and peer learning opportunities with local regions and member jurisdictions in collaboration with staff experts.

Finance: Plans, organizes, manages, and provides oversight of all finance, accounting, and auditing programs. Assists in the development and administration of SACOG's annual Overall Work Program (OWP). Establishes and ensures compliance with accounting, auditing, and financial internal controls and reporting practices. Oversees annual financial, compliance, and internal audits. Coordinates preparation of the Comprehensive Annual Financial Report (CAFR).

Planning: Manages, oversees, and participates in regional planning studies; manages the update of the Metropolitan Transportation Plan/Sustainable Communities Strategies (MTP/SCS) including working closely with member jurisdictions to obtain data and required information, reviewing the analyses of land use, economic, housing, and demographic data and development of projections, validating the integrity of project data, reviewing financial and revenue analyses associated with projects to satisfy financial constraints, and approving alternative and recommended scenarios.

Research and Analysis: Manages the forecasting of travel conditions, travel behaviors, and air quality to develop and implement analyses and recommendations for air quality compliance, climate change, and other SACOG projects, programs, and initiatives.

Rural-Urban Connections Strategy: Develops and implements economic and environmental sustainability strategy for rural areas; manages assigned agricultural, land use, and natural resources projects and case studies. Engages officials and regulatory agencies, member jurisdictions, and other stakeholders to advance agricultural and natural resources objectives, initiatives, and strategies including those related to water resources, flood control projects, groundwater recharge, habitat conservation, ecosystem issues, and related issues.

Transportation Services: Plans, organizes, manages, and provides oversight of federal and state transportation planning and policy development programs, the use of federal, state, and local funding for transportation projects, and the project development and delivery. Coordinates the development of the Overall Work Program (OWP) and agency-wide budget development process including participating in establishing annual transportation, air quality, and other regional planning objectives as well as identifying funding and conducting financial modeling and analysis.

Policy and Administration: Directs the administration of comprehensive human resources programs and activities, including recruitment and selection, job analysis and classification, compensation, employee relations, employee training and development, personnel policies and procedures, and general human resources administration. Oversees facilities management contract; negotiates leases; approves requests and expenditures for maintenance repairs and capital improvements to facilities. Strategizes and develops SACOG's legislative platform and approach for advancing SACOG's interests at the state and federal level in terms of funding and policy.

All Positions:

- Assumes full management responsibility for the operations and activities of assigned teams, programs, and projects.
- Develops and directs the implementation of goals, objectives, policies, procedures, and work standards for the assigned functions.
- Selects, trains, motivates, and directs team personnel; evaluates and reviews work for acceptability and conformance with team standards; works with employees on performance issues; implements discipline and termination procedures; responds to staff questions and concerns.
- Manages and participates in the development and administration of assigned team budget; directs the forecast of additional funds needed for staffing, equipment, materials, and supplies; directs the monitoring of and approves expenditures; directs and implements adjustments as necessary.
- Contributes to the overall quality of the assigned areas of responsibility by developing, reviewing, and implementing policies and procedures to meet legal requirements and SACOG's needs; continuously monitors and evaluates the efficiency and effectiveness of service delivery methods and procedures; assesses and monitors the distribution of work, support systems, and internal reporting relationships; identifies opportunities for improvement; directs the implementation of change; prepares various staff reports on operations and activities.
- Advises senior management, Team Managers, SACOG staff, and consultants on and provides strategic input, data and analysis, and technical oversight for assigned areas of resonsponsbility.
- Provides staff support to committees and task forces; oversees preparation of agendas, staff reports, and facilitation of meetings.
- Oversees the development of consultant requests for proposals for professional services and the advertising and bid processes; evaluates proposals and recommends project award; coordinates with legal counsel to determine SACOG's needs and requirements for contractual services; negotiates contracts and agreements and administers same after award.
- Represents SACOG in state and regional meetings and serves as a liaison with local agencies, elected officials, outside agencies, and the public; oversees and makes presentations to the public, community groups, various committees, elected boards, and the SACOG Board of Directors.
- Participates on the Strategic Management Team providing input on implementation of the goals, policies, and directives of the Board of Directors; provides input on project and program issues, policy, and strategic direction.
- Prepares, reviews, and presents staff reports, various management and information updates, and reports on special projects as assigned by the Deputy Executive Director(s), Executive Director, and Board of Directors.
- Monitors changes in laws, regulations, and technology that may affect SACOG or team operations and programs; implements policy and procedural changes as required.
- Responds to public inquiries and complaints and assists with resolutions and alternative recommendations.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Administrative principles and practices, including goal setting and program development, implementation, and evaluation.
- Principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures.
- Budget development, contract administration, administrative practices, and general principles of risk management related to the functions of the assigned area.
- Organizational and management practices as applied to the analysis and evaluation of projects, programs, policies, procedures, and operational needs.
- Principles and practices of assigned areas of responsibility.
- Recent and on-going developments, current literature, and sources of information related to assigned programs and services.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Record keeping principles and procedures.
- Modern office practices, methods, and computer equipment and applications related to the work.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing SACOG in contacts with governmental agencies, community groups, various business, professional, educational, and regulatory organizations, and the public.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and SACOG staff.

Ability to:

- Develop and implement goals, objectives, policies, procedures, work standards, and internal controls for the team and assigned program areas.
- Provide administrative and professional leadership and direction for assigned teams, programs, and projects.
- Develop, plan, coordinate, and implement a variety of assigned programs and services suited to the needs of the community and SACOG.
- Conduct complex research projects, evaluate alternatives, make sound recommendations, and prepare effective technical reports.
- Effectively represent the team and SACOG in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Prepare and administer team budgets; allocate limited resources in a cost effective manner.
- Interpret, apply, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.
- Plan, organize, direct, and coordinate the work of team staff; delegate authority and responsibility.
- Select, train, motivate, and evaluate the work of staff and train staff in work procedures.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Prepare clear and concise reports, correspondence, policies, procedures, and other written materials.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.

- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major coursework in assigned area of responsibility and five (5) years of broad and progressively responsible program management experience including at least two (2) years of supervisory experience.

Licenses and Certifications:

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various SACOG meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

The employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, member jurisdictions, government officials, community representatives, and the general public in explaining SACOG policies and requesting and providing information.

EFFECTIVE: October 2015
REVISED: October 2018
FLSA: Exempt

PRINCIPAL ANALYST

DEFINITION

Under general direction:

1. plans, organizes, manages, and provides oversight of assigned staff, programs, and projects;
2. researches, develops, and recommends agency-wide project, program, and business operations standards, policies, and procedures;
3. provides technical leadership and guidance to SACOG management and staff and external stakeholders in areas of expertise;
4. coordinates assigned activities with those of other teams and outside agencies; and
5. performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from assigned management personnel. As a Team Manager exercises direct and general supervision over assigned team members.

CLASS CHARACTERISTICS

This is the principal level in the Analyst class series responsible for **leading** all activities related to assigned team, programs, and projects including short- and long-term planning and development, mentoring assigned team members, and administering team policies, procedures, and services.

Positions serve as a technical expert in multiple disciplinary and/or programmatic areas and lead large, complex, and multi-disciplinary projects, programs, studies, and initiatives directly and/or by providing technical guidance and direction to assigned analysts.

Successful performance of the work requires knowledge of public policy, SACOG functions and activities and coordinating the activities of assigned team with those of other teams and outside agencies.

Positions are accountable for accomplishing team planning and operational goals and objectives and for furthering SACOG goals and objectives within general policy guidelines.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

These functions may not be present in all positions in this classification. When a position is to be filled, the essential functions will be noted in the announcement of position availability.

Administration and Operations: Directs the administration of comprehensive human resources programs and activities, including recruitment and selection, job analysis and classification, compensation, employee relations, employee training and development, personnel policies and procedures, and general human resources administration. Oversees facilities management contract; negotiates leases; approves requests and expenditures for maintenance repairs and capital improvements to facilities. Oversees and manages the administration and maintenance of the information technology infrastructure, systems, and databases; develops long-term strategies to plan for upgrades and growth; and updates and maintains the IT Master Plan.

Data and Mapping Services: Oversees and manages the administration and maintenance of the Geographic Information Systems program including databases and integration with related information technology infrastructure and systems; develops short- and long-term strategies to plan for upgrades and growth; and encourages innovation among technical staff in the utilization and implementation of ideas and techniques. Provides strategic advice on evaluation, selection, implementation, and maintenance of GIS and information technology systems and ensures appropriate investment in operational systems. Oversees quality assurance and control of data including researching and implementing protocols for data structure, standardization, and normalization.

Innovation/Partnerships: Serves as a liaison and builds coalitions between SACOG and key external stakeholders in order to advance the priorities and interests of SACOG and member jurisdictions; recommends SACOG participation in key regional activities. Provides leadership and technical guidance to assigned team and program management including developing program goals, objectives, and work plans, establishing program policies, procedures, and eligibility requirements, and evaluating program effectiveness and recommending and implementing necessary changes. Researches best practices and peer learning opportunities with local regions and member jurisdictions in collaboration with staff experts.

Finance: Plans, organizes, manages, and provides oversight of all finance, accounting, procurement and contracts, budget, compliance, and/or auditing programs. Establishes and ensures compliance with internal controls, auditing and accounting principles, and reporting practices. Participates in annual financial, compliance, and internal audits. Coordinates preparation of the financial, budgetary, compliance, and related reports.

Planning: Manages, oversees, and participates in regional planning studies related to land use, housing, airport, demographic, and/or economic and environmental sustainability. Leads the update and implementation of the Metropolitan Transportation Plan/Sustainable Communities Strategies (MTP/SCS) including working closely with member jurisdictions to obtain data and required information, reviewing the analyses of data and development of projections, validating the integrity of project data, reviewing financial and revenue analyses associated with projects to satisfy financial constraints, and approving alternative and recommended scenarios. Directs and participates in conducting technical assessments, studies, and written project and program analyses, determines impacts of proposed member jurisdiction projects on the regional resources, develops policies related to mitigation measures, and performs detailed data analyses to complete planning scenario models. Engages officials and regulatory agencies, member jurisdictions, and other stakeholders to advance planning objectives, initiatives, and strategies.

Policy: Strategizes and provides professional support in developing SACOG's legislative platform and approach for advancing SACOG's interests at the state and federal level in terms of funding and policy. Serves as a liaison between SACOG and federal and state legislators, other government entities, interest groups, and other stakeholders to advance and represent the

priorities and interests of SACOG and member jurisdictions. Researches and evaluates the effect of current and pending legislation affecting SACOG; prepares critiques and research papers; recommends and implements policy and procedural changes.

Transportation Modeling and Analysis: Oversees and manages the development and implementation of SACOG's regional travel demand model (TDM), including managing the use of TDM for SACOG sponsored projects and member jurisdiction projects and forecasting studies and analyses. Directs and leads the organization, development, and management of data to test, calibrate, and ensure the consistency, reliability, and validity of transportation, land use, travel demand forecasting, economic, and air quality models.

Transportation Services: Plans, organizes, manages, and provides oversight of assigned federal and state transportation planning and policy development programs. Manages the programming of federal, state, and local funds related to transit, transportation, air quality, airport, and economic and environmental sustainability programs, projects, and studies and ensures that all funding and reporting requirements are properly executed. Manages and coordinates the development and delivery of SACOG and member jurisdiction projects, studies, and programs. Leads the development of the Overall Work Program (OWP) including participating in establishing annual transportation, air quality, and other regional planning objectives as well as researching, identifying, and applying for grants, conducting financial modeling and analysis, and managing post award funding.

All Positions:

- Assumes full management responsibility for the operations and activities of an assigned team and assigned programs and projects.
- Contributes to the overall quality of assigned team and areas of responsibility by developing, reviewing, and implementing goals, objectives, policies, and procedures; ensuring compliance with legal requirements; continuously monitoring and evaluating the efficiency and effectiveness of service delivery methods and procedures; assessing and monitoring the distribution of work, support systems, and internal reporting relationships; identifying opportunities for improvement; facilitating change management; and preparing various staff reports on operations and activities.
- Provides leadership, mentoring, and technical guidance as an agency-recognized **subject matter expert and advisor** in multiple disciplines and/or programmatic areas.
- **Manages large, complex, and multi-disciplinary projects, programs, studies, and initiatives directly or through lower-level analysts**; identifies resource needs and develops work plans; develops and oversees the administration of assigned budget including monitoring and approving expenditures and directing and implementing adjustments as necessary.
- **Leads and participates in internal and interagency technical work groups as a technical expert** to gather information for policy and decision making and to advance and represent the priorities and interests of SACOG and member jurisdictions; identifies and researches local and regional needs and critical issues; identifies key stakeholders and develops partnerships; recommends solutions and resolves problems and meet requirements and anticipated changes; advises staff and management on changes.
- Selects, trains, motivates, mentors, and directs team personnel; evaluates and reviews work for acceptability and conformance with team standards; works with employees on performance issues; implements discipline and termination procedures; responds to staff questions and concerns.

- Oversees the development of consultant requests for proposals for professional services and the advertising and bid processes; evaluates proposals and recommends project award; coordinates with legal counsel to determine SACOG's needs and requirements for contractual services; negotiates contracts and agreements and administers same after award.
- Represents SACOG in state and regional meetings and serves as a liaison with local agencies, elected officials, outside agencies, and the public; makes presentations to SACOG management and staff, the public, community groups, various committees, elected boards, and the SACOG Board of Directors.
- Provides staff support to committees and task forces; oversees preparation of agendas, staff reports, and facilitation of meetings.
- Prepares, reviews, and presents staff reports, various management and information updates, and reports on special projects as assigned.
- Monitors changes in laws, regulations, and technology that may affect SACOG or team operations and programs; implements policy and procedural changes as required.
- May participate in Management Team meetings to provide input on implementation of the goals, policies, and directives of the Board of Directors; provides input on project and program issues, policy, and strategic direction.
- Responds to public inquiries and complaints and assists with resolutions and alternative recommendations.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Administrative principles and practices, including goal setting and program development, implementation, and evaluation.
- Organizational and management practices as applied to the analysis and evaluation of projects, programs, policies, procedures, and operational needs.
- Expert-level theories and concepts related to assigned area of responsibility.
- Quality assurance and quality control principles and practices of within areas of expertise.
- Principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures.
- Budget development, contract administration, administrative practices, and general principles of risk management related to the functions of the assigned area.
- Recent and on-going developments, current literature, and sources of information related to assigned programs and services.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Record keeping principles and procedures.
- Modern office practices, methods, and computer equipment and applications related to the work.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing SACOG in contacts with governmental agencies, community groups, various business, professional, educational, and regulatory organizations, and the public.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and SACOG staff.

Ability to:

- Develop and implement goals, objectives, policies, procedures, work standards, and internal controls for the team and assigned program areas.
- Provide administrative leadership and technical guidance and direction for assigned team, programs, and projects as an agency-recognized subject matter expert and advisor in assigned area of responsibility.
- Manage large, complex, and multi-disciplinary projects, programs, studies, and initiatives, evaluate alternatives, make sound recommendations, and prepare effective technical reports.
- Develop, plan, coordinate, and implement assigned programs and services suited to the needs of the community and SACOG.
- Effectively represent the team in meetings with SACOG management and staff, governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Prepare and administer team budget; allocate limited resources in a cost effective manner.
- Interpret, apply, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.
- Plan, organize, direct, and coordinate the work of team staff; delegate authority and responsibility.
- Select, train, motivate, and evaluate the work of staff and train staff in work procedures.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Prepare clear and concise reports, correspondence, policies, procedures, and other written materials.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major coursework in assigned area of responsibility and three (3) years of progressively responsible program management experience including at least one (1) year of project lead and/or supervisory experience.

Licenses and Certifications:

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various SACOG meeting sites; vision

to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

The employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, member jurisdictions, government officials, community representatives, and the general public in explaining SACOG policies and requesting and providing information.

EFFECTIVE: July 1, 2021
REVISED:
FLSA: Exempt

PROCUREMENT OFFICER

DEFINITION

Under general supervision or direction, provides analytical assistance in the administration of SACOG's procurement and contract functions; develops and implements contracts, strategic procurement planning, procurement policies and procedures, delegated procurements, quality control, procurement training, electronic procurement systems, and procurement card administration; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from assigned Manager. May be assigned to serve as Program Manager which involves exercising direct and general supervision over assigned staff.

CLASS CHARACTERISTICS

This is a single position classification that is responsible for overseeing the daily operations of SACOG's procurements and contracts. The position performs a variety of management and administrative duties in the areas of procurement and contracts to ensure efficient service provision. The work requires recommending and implementing office policies, procedures, and regulations and involves performing various research and administrative support functions.

Employees serve as a technical expert in procurement and contracts, using initiative and resourcefulness in deviating from traditional methods or researching trends and patterns to develop new methods, criteria, or proposed new policies and procedures. Employees in this class are typically assigned to manage large, complex, and multi-disciplinary procurement and contract duties that involve contact outside of the agency and the ability to manage multiple stakeholder interests, require a high level of technical expertise and acumen in support of management and/or Board priorities, strategic initiatives, and directives, and are of high visibility and sensitivity to SACOG in areas of its core business initiatives.

Employees play a leading role in agency planning discussions related to procurement and contracts. The work involves a high-level of problem-solving requiring analysis of unique issues or increasingly complex problems without precedent and/or structure and formulating, presenting, and implementing strategies and recommendations for resolution. Work assignments are typically given as broad, conceptual ideas and directives and incumbents are accountable for overall results and responsible for developing guidelines, action plans, and methods to produce deliverables on time and within budget.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Establish contracts for the purchase of supplies, services and construction.
- Review major solicitations and contracts to ensure compliance and identify opportunities for improvement.
- Co-develop and assist in prescribing and administering operational procedures governing the procurement functions for SACOG.

- Recommend revisions to policies to the assigned Manager regarding the purchase of supplies and services.
- Establish, maintain and disseminate guides, manuals and other documents regarding procurement policies and procedures.
- Ensure compliance with state and federal mandates and procurement policies and procedures by reviewing and monitoring procurements conducted by SACOG.
- Develop and conduct internal and external procurement training.
- Provide support services for information technology systems used to facilitate purchasing.
- Administer or manage the procurement card program.
- Establish staff priorities; allocate personnel resources to achieve program objectives.
- Research market sources and vendors to locate and ensure most cost effective and competitive pricing for the purchase of supplies and services.
- Prepare and issue solicitation documents.
- Receive and evaluate proposals and bids; award or recommend the award of contracts.
- Conduct negotiations with suppliers on proposals, contracts and contract claims.
- Assist in the general supervision and control over all inventories of supplies.
- Assist in establishing and maintaining programs for the inspection, testing and acceptance of supplies and services.
- Maintain the integrity of the public procurement process.
- Assist in administering operational procedures governing the procurement functions, and the disposal, transfer and reutilization of personal property and equipment, consistent with all applicable laws, policies, and rules.
- Assist with establishing standard contract clauses for use in contracts, solicitations, and purchase orders.
- Analyze current procurement activities and recommend improvements through more efficient procurement methods, e-procurement, privatization, quantity discounts, standardization, value analysis or cooperative purchasing.
- Assist in decisions regarding hiring, discipline and promotion of subordinate staff; direct and evaluate subordinate staff.
- Delegate authority and assign work to subordinate staff commensurate with their qualifications and existing workload. Review the work of staff to insure compliance with applicable laws, policies and procedures.
- Assist staff by providing technical guidance and direction.
- Assist in establishing and supervising a contract administration system designed to ensure that contractors are performing in accordance with the terms and conditions of their contracts.
- Determine budgetary requirements to maintain the program; make recommendations on the annual budget; monitor program budget.
- Effectively communicate purchasing policies and procedures to all personnel and interpret said policies and procedures as necessary.
- Prepare reports and correspondence.
- Prepare and maintain accurate records and documentation on all staff activities.
- Maintain liaison and represent the program to other departments and suppliers.
- Perform other related duties to ensure the accomplishment of the goals and objectives of SACOG.

QUALIFICATIONS

Knowledge of:

- Modern principles and practices of large-scale governmental procurement and supply-chain management.
- Business practices related to purchasing.

- Laws, policies and procedures governing public procurement, including California contract law and Federal Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR 200).
- Available information system technologies which enhance business practices.
- Principles, practices and techniques of administration, organization, budget preparation, personnel management, supervision, training and development, financial administration and customer service.
- Techniques of organizing and motivating individuals and groups.
- Administrative problem solving and the implementation of effective solutions.
- Principles of management analysis and organization design necessary to formulate and implement administration practices.
- Cost accounting as it relates to price and cost analysis.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Quality assurance and quality control principles and practices

Ability to:

- Develop effective and cooperative working relationships with other departments, employees, suppliers and other public agencies.
- Coordinate, manage, problem solve, strategize, schedule, analyze, and plan.
- Use judgment and initiative in making recommendations and resolving problems that are highly complex and sensitive in nature.
- Identify and implement information technology solutions related to electronic purchasing systems.
- Effectively communicate orally and in writing, including the ability to convey complex and technical subjects in a clear, concise and positive manner.
- Organize own work, set priorities, and meet critical time deadlines.
- Act with complete integrity and a high sense of personal and professional ethics.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.
- Independently manage programs and projects.
- Provide leadership and technical guidance as an agency-recognized subject matter expert and advisor in procurement and contracts, including performing varied duties requiring many different and unrelated processes and methods applied to a broad range of activities or substantial depth of analysis.
- Techniques for effectively representing SACOG in contacts with governmental agencies, vendors, and the public.
- Make effective decisions under circumstances that may include uncertainty in approach, methodology, or interpretation and evaluation processes, as well as continuing changes in program, technological developments, unknown phenomena, or conflicting requirements.
- Originate new techniques and establish standards by identifying and defining unknown conditions, resolving critical problems, and developing new theories.

Education and/or Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major coursework in business or public administration, business law, finance, purchasing, management information systems, or a closely related field.

At least five (5) years of increasingly responsible experience in public procurement or contracts.

Licenses and Certifications:

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.
- Certified Public Procurement Officer (CPPO) or equivalent within four (4) years from date of appointment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

This is primarily a sedentary classification and the employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, other agency representatives, member jurisdictions, government officials, business representatives, and the general public in explaining SACOG policies and requesting and providing information.

EFFECTIVE: 4/19/2018
REVISED:
FLSA: Exempt

RESEARCH TECHNICIAN

DEFINITION

Under general supervision, performs a variety of research support activities, including collecting, inputting, maintaining, and reporting a variety of information and data in support of SACOG projects and programs; develops, summarizes, and maintains reports, records, and files; performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from assigned Team Manager. Exercises no supervision over staff.

CLASS CHARACTERISTICS

This is a fully competent class that researches, collects, and maintains a variety of data and information in support of assigned SACOG projects and programs. Incumbents perform the full range of technical research support duties within established research design and procedural frameworks. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise, and are fully aware of the operating procedures and policies of the work unit. Employees at this level are required to be fully trained in all procedures related to assigned area of responsibility. This class is distinguished from the Analyst classification series in that the latter perform professional-level planning and research and analysis requiring completion of a four-year degree.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Researches, compiles, manipulates, converts, and organizes information and data from member jurisdictions and other sources on a variety of specialized topics related to programs and projects in assigned area; checks and tabulates standard mathematical or statistical data; prepares and assembles reports, manuals, articles, research papers, and other informational materials.
- Develops and implements data maintenance systems; researches data records to prepare reports and provides follow-up information to staff inquiries.
- Uses geographic information systems (GIS) and similar software tools to create, manipulate, and maintain a comprehensive library of spatial data tables and layers; assists in gathering, digitizing, analyzing, and interpreting spatial data; ensures data standards are met.
- Creates and maintains a variety of maps, charts, graphs, and tabular data from a variety of sources; explains technical information to non-technical system users, including assisting them in accessing and interpreting GIS information.
- Maintains various databases and spreadsheets ensuring data quality and integrity; resolves issues and discrepancies.
- Communicates with staff and various outside agencies to exchange information and resolve issues or concerns.
- Coordinates and integrates projects and activities with other SACOG staff and outside agencies.

- Operates a variety of standard office equipment, including job-related computer hardware and software applications, copiers, and telephones.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles, practices, and methods of data collection and reporting.
- Quality assurance procedures and documentation standards for database systems.
- Technology, hardware and software, and current applications related to database management, mapping and report generation, and desktop publishing systems.
- Principles and practices of digitizing, data conversion, data management, and cartography.
- Modern office practices, methods, and computer equipment and applications related to work.
- Record keeping principles and procedures.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, SACOG staff and staff of member agencies in person and over the telephone.

Ability to:

- Research, summarize, and present technical information and data in an effective manner.
- Create, manipulate, and maintain a comprehensive library of spatial data tables and layers.
- Create and modify maps, plans, and illustrative graphics using GIS and related software tools.
- Make accurate arithmetic and statistical computations.
- Respond to and effectively prioritize multiple phone calls and other requests for service.
- Understand the organization and operation of SACOG and of outside agencies as necessary to assume assigned responsibilities.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, and prudence within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to the completion of the twelfth (12^{th}) grade and two (2) years of research experience. Additional coursework in Geographic Information Systems (GIS) or a related field is highly desirable.

Licenses and Certifications:

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various SACOG meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

The employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, member jurisdictions, transportation and government officials, community representatives, and the general public in explaining SACOG policies and requesting and providing information.

EFFECTIVE: October 2015
REVISED:
FLSA: Non-Exempt

SENIOR ACCOUNTANT

DEFINITION

Under general supervision or direction, performs professional accounting work, including auditing, analyzing, and verifying fiscal records and reports, processing invoices, assisting with budget preparation, and providing information to SACOG staff regarding accounting principles, practices, and procedures; assists in maintaining SACOG's financial system; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from assigned Manager. May be assigned to serve as Team Manager which involves exercising direct and general supervision over assigned staff.

CLASS CHARACTERISTICS

This is the senior level in the Accountant class series. This is an advanced competency class that performs the full range of routine to complex accounting and record-keeping functions under general supervision or direction.

Work assignments are typically given as broad, conceptual ideas and directives and incumbents are accountable for overall results and responsible for developing guidelines, action plans, and methods to produce deliverables on time and within budget.

This class is distinguished from the Finance Director in that the latter has full management and supervisory authority in planning, organizing, and directing the full scope of professional accounting operations within the department.

Employees serve as a technical expert using initiative and resourcefulness in deviating from traditional methods or researching trends and patterns to develop new methods, criteria, or proposed new policies and procedures. Employees in this class are typically assigned to manage large and complex tasks, and require a high level of technical expertise and acumen. Work involves a high-level of problem-solving requiring analysis of unique issues or increasingly complex problems without precedent and/or structure and formulating, presenting, and implementing strategies and recommendations for resolution.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Provides responsible professional and technical assistance in the administration and implementation of SACOG's financial, auditing, and accounting programs.
- Monitors expenditures, revenues, budget allocations, and contracts to determine project financial status; verifies availability of funds; prepares reimbursement reports as needed; monitors special fund compliance requirements.
- Prepares journal entries and reconciles general ledger and subsidiary accounts related to postings from payroll, accounts payable, cash receipts, and accounts receivable; prepares monthly financial statements, including distributing monthly revenue and expenditure reports to departments; prepares numerous monthly financial reports.

- Analyzes and reconciles expenditure and revenue accounts, including grant billing accounts; reviews funding agreements, sets up tracking spreadsheets, and prepares periodic billings for grants; updates financial information on quarterly discretionary grant reports.
- Prepares financial documents in support of the development and submission of the Overall Work Program (OWP) and amendments.
- Assists in the preparation of annual budgets by analyzing revenue by source and preparing financial budgetary and other budget detail in cooperation with program staff.
- Provides support to the development of the Comprehensive Annual Financial Report (CAFR) including preparing footnotes and accompanying schedules.
- Coordinates with member jurisdictions and auditors on the submission of the State Controller's report including the reconciliation of various transportation plans.
- Coordinates annual audits including coordinating Transportation Development Act (TDA) audits.
- Audits claims, vouchers, and purchase orders for fraudulent or improper authorization and other discrepancies; resolves discrepancies where interpretation of guidelines, data or procedures is necessary.
- Interprets, explains, and applies general and governmental accounting/auditing principles and procedures, laws, and regulations affecting financial operations.
- Evaluates and audits internal controls to ensure accuracy of financial reporting and accounting processes.
- Participates in the design, control, operation, and enhancement of manual and computerized systems.
- Conducts and monitors financial audits of agencies receiving money through SACOG to determine compliance with fiscal requirements; interprets and evaluates financial reporting requirements.
- Reviews source documents for compliance with rules and regulations; determines proper handling of accounting and technical transactions within designated limits.
- Prepares comprehensive financial and accounting studies, statistics, statements, and reports, including finance and project cost reports and financial statement analyses.
- Responds to requests for information and attempts to resolve them by researching files and records within the scope of authority; refers matters requiring policy interpretation to supervisor for resolution.
- Maintains accurate records and files; develops storage of records and retention schedules.
- Attends meetings, conferences, workshops, and training sessions, and reviews publications to remain current on principles, practices, and new developments in accounting.
- Performs other duties as assigned.

This class is distinguished from the Accountant class by performing these functions:

- May supervise professional accounting staff.
- Provides leadership and technical guidance as an agency-recognized subject matter expert and advisor using initiative and resourcefulness in deviating from traditional methods and analyzing unique issues or problems without precedent and/or structure; researches trends and patterns to develop new standards, models, methods, criteria, or proposed new policies and procedures related to accounting; oversees quality assurance and quality control activities within assigned areas.
- Provides expert consultation to meet user needs including recommending, designing, and coordinating both changes to business practices and specific technology solutions.
- Interprets SACOG's business needs and identifies and analyzes critical issues; recommends solutions and resolves complex problems; develops new processes and procedures to meet requirements and anticipated changes; advises staff and management on changes.

QUALIFICATIONS

Knowledge of:

- Modern principles, practices, and methods of public and governmental accounting and financial analysis, including project/program budgeting and auditing, grants accounting, and the application to agency operations.
- General principles and practices of data processing and its applicability to accounting and public agency operations.
- Professional accounting and auditing standards such as generally accepted accounting principles (GAAP) and generally accepted auditing standards (GAAS).
- Business arithmetic and financial and statistical techniques.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to public agency financial operations.
- Research and reporting methods, techniques, and procedures.
- Technical report writing and preparation of correspondence.
- Record keeping principles and procedures.
- Modern office practices, methods, and computer equipment and applications related to work, including word processing and spreadsheet software.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, SACOG staff and staff of member agencies in person and over the telephone.

This class is distinguished from the Accountant class by knowledge of:
- Expert-level theories and concepts related to assigned area of responsibility.
- Quality assurance and quality control principles and practices of within areas of expertise.
- Organizational and management practices as applied to the analysis, evaluation, development, and implementation of programs, policies, and procedures.

Ability to:

- Analyze financial data and draw sound conclusions.
- Prepare clear, complete, and concise financial statements and reports.
- Review, post, balance, reconcile, and maintain accurate and confidential accounting and financial records.
- Control receipt and disbursal of special funds and grants.
- Analyze, interpret, summarize and present accounting and financial information and data in an effective manner.
- Interpret, apply, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.
- Recommend, develop, and implement work plans and effectively manage grants, programs, projects, and studies.
- Lead assigned team including planning, organizing, directing, coordinating, and evaluating the work of assigned team members.
- Make accurate arithmetic, financial, and statistical computations.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.

- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

This class is distinguished from the Accountant class by the ability to:

- Provide leadership and technical guidance as an agency-recognized subject matter expert and advisor in assigned area of responsibility including performing varied duties requiring many different and unrelated processes and methods applied to a broad range of activities or substantial depth of analysis.
- Manage large, complex, and multi-disciplinary projects, programs, studies, and initiative.
- Make effective decisions under circumstances that may include uncertainty in approach, methodology, or interpretation and evaluation processes, as well as continuing changes in program, technological developments, unknown phenomena, or conflicting requirements.
- Originate new techniques and establish standards by identifying and defining unknown conditions, resolving critical problems, and developing new theories.

Education and/or Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major coursework in accounting, finance, business or public administration, or a closely related field and five (5) years of responsible professional accounting experience, preferably in the public sector.

Licenses and Certifications:

None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

The employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, member jurisdictions, external funding agencies, and business representatives in explaining SACOG policies and procedures and requesting and providing information.

EFFECTIVE: December 1, 2018
REVISED:
FLSA: Exempt

SPECIAL PROJECTS ADVISOR

DEFINITION

Under general direction, plans, organizes, manages, and provides oversight of assigned projects; recommends and implements policies, procedures, and practices; coordinates assigned activities with those of other teams; provides highly responsible and complex professional assistance to the Executive Director, Deputy Executive Director(s), or Manager(s) in areas of expertise; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the Executive Director Executive Director, Deputy Executive Director(s), or Manager(s). Typically does not supervise other staff.

CLASS CHARACTERISTICS

This is a specialized classification responsible for providing substantive analysis and highly complex assistance to the Executive Director, Deputy Executive Director(s), or Manager(s) in development of both long term strategy and short term tactics for advancing SACOG programs and projects. This classification also manages all activities related to assigned projects including short- and long-term planning and development and administration of policies, procedures, and services. This class provides assistance to the Executive Director, Deputy Executive Director(s), or Manager(s) in a variety of administrative, coordinative, analytical, and liaison capacities.

Successful performance of the work requires knowledge of public policy, SACOG functions and activities, and the ability to develop, oversee, and implement multiple programs, projects, and services in assigned area of responsibility. Responsibilities include coordinating the activities of assigned projects with those of other staff and outside agencies and managing and overseeing the complex and varied functions of assigned projects. The incumbent is accountable for accomplishing goals and objectives and for furthering SACOG goals and objectives within general policy guidelines.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

These functions may not be present in all positions in this classification. When a position is to be filled, the essential functions will be noted in the announcement of position availability.

- Provide leadership in conducting substantive analysis and assist in devising substantive and policy strategy for SACOG's programs and initiatives.
- Assist in the development of SACOG's strategic plan and managing its implementation
- Researches national, state and local policy and prepares opinions and recommendations on issues related to SACOG's programs and initiatives.
- Manages resources as assigned.
- Develops and directs the implementation of goals, objectives, policies, procedures, and work standards for the assigned projects.
- Manages and participates in the development and administration of assigned project budget; directs the forecast of additional funds needed for staffing, equipment, materials, and supplies; directs the monitoring of and approves expenditures; directs and implements adjustments as necessary.
- Contributes to the overall quality of the assigned areas of responsibility by developing, reviewing, and implementing policies and procedures to meet legal requirements and SACOG's needs; continuously monitors and evaluates the efficiency and effectiveness of service delivery methods and procedures; assesses and monitors the distribution of work, support systems, and internal reporting relationships; identifies opportunities for improvement; directs the implementation of change; prepares various staff reports on operations and activities.
- Advises Executive Director or Deputy Executive Director(s), Manager(s), other staff, and consultants on, and provides strategic input, data and analysis, and technical oversight for assigned projects.
- Oversees the development of consultant requests for proposals for professional services and the advertising and bid processes; evaluates proposals and recommends project award; coordinates with legal counsel to determine SACOG's needs and requirements for contractual services; negotiates contracts and agreements and administers same after award.
- Represents SACOG in state and regional meetings and serves as a liaison with local agencies, elected officials, outside agencies, and the public; oversees and makes presentations to the public, community groups, various committees, elected boards, and the SACOG Board of Directors.
- Provides input to the Executive Director, Deputy Executive Director(s), or Manager(s) on implementation of the goals, policies, and directives of the Board of Directors; provides input on project and program issues, policy, and strategic direction.
- Monitors changes in laws, regulations, and technology that may affect SACOG operations and programs; implements policy and procedural changes as required.
- Responds to public inquiries and complaints and assists with resolutions and alternative recommendations.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Administrative principles and practices, including goal setting and program development, implementation, and evaluation.
- Budget development, contract administration, administrative practices, and general principles of risk management related to the functions of the assigned area.
- Organizational and management practices as applied to the analysis and evaluation of projects, programs, policies, procedures, and operational needs.
- Principles and practices of assigned areas of responsibility.

- Recent and on-going developments, current literature, and sources of information related to assigned programs and services.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Record keeping principles and procedures.
- Modern office practices, methods, and computer equipment and applications related to the work.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing SACOG in contacts with governmental agencies, community groups, various business, professional, educational, and regulatory organizations, and the public.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and SACOG staff.

Ability to:

- Develop and implement goals, objectives, policies, procedures, work standards, and internal controls for the team and assigned program areas.
- Provide administrative and professional leadership and direction for assigned projects.
- Develop, plan, coordinate, and implement a variety of assigned projects suited to the needs of the community and SACOG.
- Conduct complex research projects, evaluate alternatives, make sound recommendations, and prepare effective technical reports.
- Effectively represent the team and SACOG in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Prepare and administer team budgets; allocate limited resources in a cost effective manner.
- Interpret, apply, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.
- Plan, organize, direct, and coordinate assigned work; delegate authority and responsibility.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Prepare clear and concise reports, correspondence, policies, procedures, and other written materials.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to graduation from an accredited four-year college or university with major coursework in assigned area of responsibility and ten (10) years of broad and progressively responsible program management experience including at least two (2) years of supervisory experience.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various SACOG meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

The employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, member jurisdictions, government officials, community representatives, and the general public in explaining SACOG policies and requesting and providing information.

EFFECTIVE: February 1, 2022
REVISED:
FLSA: Exempt

STAFF ASSISTANT

DEFINITION

Under direct supervision, provides research, administrative, and general support for SACOG projects, programs, and teams; researches, writes, and presents reports and recommendations; and performs other duties as required.

SUPERVISION RECEIVED AND EXERCISED

Receives direct supervision from assigned Team Manager. Exercises no supervision over staff.

CLASS CHARACTERISTICS

This classification may be used for persons who have completed academic requirements but are working toward professional certification or registration, for persons for which experience is a prerequisite for entrance to graduate school, or for persons who have received a degree or diploma but are taking additional coursework or need work experience for a specific career field. Assignments help SACOG achieve program and project objectives and provide the incumbent with on-the-job exposure in a professional or technical field of study related to SACOG's services, programs, and projects.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Performs a variety of administrative, project-related, and program-specific assignments to assist SACOG teams and to receive on-the-job exposure and gain practical experience in a professional or technical field of study.
- Researches, compiles, and organizes information and data; checks data; prepares and assembles reports, manuals, articles, announcements, and other informational materials.
- Performs a variety of office and administrative tasks in support of SACOG teams including answering phones, sorting and distributing mail, filing, and photocopying.
- Maintains and updates record systems and specialized databases; verifies accuracy of information; enters and updates information with team activity, project files, and report summaries; retrieves information from systems and specialized databases as required.
- Writes reports, letters, memoranda, and other documents.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Modern office practices, methods, and computer equipment and applications related to the work.
- Record keeping principles and procedures.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and SACOG staff.

Ability to:

- Learn and understand the organization and operation of SACOG as necessary to assume assigned responsibilities.
- Respond to and effectively prioritize multiple phone calls and other requests for service.
- Research, organize, and present information and data in an effective manner.
- Prepare clear and effective reports, correspondence, and other written material.
- Organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and/or Experience:
Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Equivalent to the completion of the twelfth (12th) grade. No experience required.

Licenses and Certifications:

None.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

This is primarily a sedentary classification and the employee works in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. The employee interfaces with staff, management, other agency representatives, member jurisdictions, government officials, business representatives, and the general public in explaining SACOG policies and requesting and providing information.

EFFECTIVE: October 2015
REVISED:
FLSA: Non-exempt

Appendix II

Evaluation Rubric

Appendix III
Sacramento Area Council of Governments
Classification Rubric - Administrative Assistant
July 2015

	Administrative Assistant I	Administrative Assistant II
Purpose	Perform administrative and office support duties, including record-keeping, reserving and setting-up meeting rooms, maintaining calendars, scheduling and coordinating facility, phone system, and office equipment maintenance, screening phone calls, visitors, and mail, and directing questions to the appropriate staff.	Responsible for performing the full range of administrative and office support duties with a focus on providing committee support by preparing, distributing, and posting agendas and taking and transcribing minutes, researching, compiling, and organizing information from various sources, processing invoices and project billing, and administering team-related projects and programs. Assesses and develops recommendations for organizational or procedural changes affecting support activities; develops standardized templates for agency-wide use; recommends improvements in work flow, procedures, and use of equipment and forms.
Level	Entry/Experienced	Fully Competent
Supervision Received	Initially receives direct supervision. As experience is gained, receives general supervision.	Receives general supervision.
Problem Solving: Involves analyzing, evaluating, reasoning, and creative thinking requirements. In a work environment, not only the breadth and variety of problems are considered, but also guidelines, such as supervision, policies, procedures, laws, regulations, and standards available to the employee.	Incumbents carry out recurring assignments independently without specific instruction, but refer deviations, problems, and unfamiliar situations not covered by instructions and procedures to assigned Team Manager for decision or help.	Work situations require independent judgment and decision-making authority when identifying, evaluating, adapting, and applying appropriate methods to accomplish assigned tasks and handle problems and deviations in the work assignment in accordance with established policies and procedures.
Authority to Make Decisions and Take Action: The degree to which employees have the freedom to take action within their job. The variety and frequency of action and decisions, the availability of policies, procedures, laws, and team manager guidance, and the consequence or impact of such decisions are considered within this factor.	The employee is responsible for the successful performance of their own work and able to prioritize and determine methods of work performance within general guidelines. Work fits an established structure or pattern. Emergency or unusual situations may occur, but are handled within procedures and rules. Impact of decisions is normally limited to the team, project, or program to which assigned.	Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements, and the methodology used in arriving at the end results are not reviewed in detail. Impact of decisions may have team, program, or agency-wide service delivery impact.
Interaction with Others: The nature and purpose of contacts with others, from simple exchanges of factual information to the negotiation of difficult issues. It also considers with whom the contacts are made, from co-workers and the public to elected or appointed public officials.	The employee is expected to use ordinary business courtesy to exchange factual information with co-workers and the public.	Interaction is primarily within the team and/or agency. The employee is required to interpret laws, policies, and procedures, apply and explain them, and influence the others to abide by them.
Knowledge, Skills, and Abilities	Knowledge of modern office practices, methods, and equipment and computer applications and ability to perform responsible administrative and office support work with accuracy, speed, and general supervision. Learning agency programs, projects, policies, and procedures.	Fully aware of the operating procedures and policies of assigned projects, programs, and team(s). Understands the organization and function of SACOG. Ability to research, compile, and organize information for various reports and perform basic data analyses; coordinate and administer special projects and programs. This level of knowledge is sufficient to provide on-the-job instruction to a fellow employee.
Education	Equivalent to the completion of the twelfth (12th) grade	Same
Experience	One (1) year of customer service or clerical office support experience	3 years of experience

Appendix III
Sacramento Area Council of Governments
Classification Rubric - Analyst
July 2015

	Analyst I	Analyst II	Associate Analyst	Senior Analyst
Purpose	Learn to apply concepts and work procedures and methods in assigned area of responsibility to resolve problems of moderate scope and complexity.	Provides analytical support to assigned programs, projects, and services on assigned team(s).	Independently manages multiple smaller projects or programs (in terms of scope, size, budget, duration, and/or complexity); researches, analyzes, and develops solutions to a wide range of issues; and/or serves as a professional-level resource for operational, financial, budgetary, legal, regulatory, political, and/or management analyses and studies which are complex in nature and diverse in scope.	Manages projects, programs, studies, or initiatives that involve contact outside of the agency and the ability to manage multiple stakeholder interests, require a high level of technical expertise and acumen in support of management and/or Board priorities, strategic initiatives, and directives, and are of high visibility and sensitivity to SACOG in areas of its core business initiatives.
Level	Entry	Experienced	Fully Competent	Senior
Supervision Received	Initially receives direct supervision. As experience is gained, receives general supervision.	Receives general supervision.	Receives general supervision. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise.	Receives general direction.
Problem Solving: Involves analyzing, evaluating, reasoning, and creative thinking requirements. In a work environment, not only the breadth and variety of problems are considered, but also guidelines, such as supervision, policies, procedures, laws, regulations, and standards available to the employee.	Employees learn to apply concepts and work procedures and methods in assigned area of responsibility and to resolve problems and issues that are specific, less complex, and/or repetitive. Exceptions or changes in procedures are explained in detail as they arise	Work situations require making independent decisions among a variety of alternatives; however, policies, procedures, standards, and regulations and/or the Team Manager are available to guide the employee towards problem resolution. Guidance is generally available in unusual situations.	Work situations require independent judgment and decision-making authority when identifying, evaluating, adapting, and applying appropriate concepts, guidelines, references, laws, regulations, policies, and procedures to resolve diverse and complex problems and issues.	Unique or increasingly complex problems and issues without precedent and/or structure. Demonstrates independent judgment in selecting methods and techniques for obtaining solutions and formulating, presenting, and implementing strategies and recommendations for resolution.
Authority to Make Decisions and Take Action: The degree to which employees have the freedom to take action within their job. The variety and frequency of action and decisions, the availability of policies, procedures, laws, and team manager guidance, and the consequence or impact of such decisions are considered within this factor.	The employee is responsible for the successful performance of his or her own work with little latitude for discretion or decision-making. Work is usually supervised while in progress and fits an established structure or pattern. Direct supervision is readily available.	The employee is responsible for the successful performance of their own work and able to prioritize and determine methods of work performance within general guidelines. Supervision is available, although the employee is expected to perform duties independently on a day-to-day basis. Emergency or unusual situations may occur, but are handled within procedures and rules. Impact of decisions is normally limited to the team, project, or program to which assigned.	Assignments are given with long-term objectives (rather than day-to-day or weekly timeframes) and general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements, and the methodology used in arriving at the end results are not reviewed in detail. Impact of decisions may have significant team, program, or agency-wide service delivery and/or budgetary impact.	Work assignments are typically given as broad, conceptual ideas and directives and incumbents are accountable for overall results and responsible for developing guidelines, action plans, and methods to produce deliverables on time and within budget.

Appendix III
Sacramento Area Council of Governments
Classification Rubric - Analyst
July 2015

	Analyst I	Analyst II	Associate Analyst	Senior Analyst
Interaction with Others: The nature and purpose of contacts with others, from simple exchanges of factual information to the negotiation of difficult issues. It also considers with whom the contacts are made, from co-workers and the public to elected or appointed public officials.	The employee is expected to use ordinary business courtesy to exchange factual information with co-workers and the public.	Interaction is primarily within the team and/or agency. The employee is required to interpret laws, policies, and procedures, apply and explain them, and influence the others to abide by them.	Interaction is agency-wide and externally. Makes presentations to the public, community groups, various committees, and elected boards. Represents SACOG on committees and task forces to develop, implement, and monitor programs and projects that impact SACOG and its member jurisdictions.	Represents SACOG on a regular basis to the Board, other public agencies, legislators, private and community organizations, regulatory and governmental agencies, and the public to provide policy direction, explain agency goals and objectives, and/or negotiate solutions to difficult problems and issues. Leads and participates in internal and interagency technical work groups as a technical expert to gather information for policy and decision making and to advance and represent the priorities and interests of SACOG and member jurisdictions.
Knowledge, Skills, and Abilities	Basic knowledge of principles, practices, concepts, theories, research methods, and sources of information related to assigned area of responsibility. Learning agency programs, projects, policies, and procedures.	Provides on-going training opportunity to employee who has less direct work experience. Is able to implement assigned programs, projects, and activities in an independent and cooperative manner, evaluate alternatives, make sound recommendations, and prepare effective technical reports.	Fully aware of the operating procedures and policies of assigned projects, programs, and team(s). Advanced principles, practices, concepts, and theories of assigned area of responsibility. This level of knowledge is sufficient to provide on-the-job instruction to a fellow employee.	Serves as a technical expert using initiative and resourcefulness in deviating from traditional methods or researching trends and patterns to develop new methods, criteria, or proposed new policies and procedures.
Education	Equivalent to graduation from an accredited four-year college or university with major coursework in business or public administration, planning, political science, finance, management information systems, computer science, or a closely related field.	Same	Same	Same
Experience	Some experience is desirable	1 year of experience	3 years of experience	5 years of experience

Attachment B

Sacramento Area Council of Governments

Monthly Salary Schedule - Effective November 1, 2015

Position	Salary Range	A			B			C			D			E		
		Monthly	13 years longevity	18 years longevity	**Monthly**	13 years longevity	18 years longevity	**Monthly**	13 years longevity	18 years longevity	**Monthly**	13 years longevity	18 years longevity	**Monthly**	13 years longevity	18 years longevity
Staff Assistant	1	**2,849**	2,921	2,994	**2,992**	3,067	3,143	**3,141**	3,220	3,300	**3,298**	3,381	3,465	**3,463**	3,550	3,639
Administrative Assistant I	2	**3,463**	3,550	3,639	**3,637**	3,727	3,821	**3,818**	3,914	4,012	**4,009**	4,109	4,212	**4,210**	4,315	4,423
Administrative Assistant II	3	**4,210**	4,315	4,423	**4,420**	4,531	4,644	**4,641**	4,757	4,876	**4,873**	4,995	5,120	**5,117**	5,245	5,376
Accounting Specialist		**4,210**	4,315	4,423	**4,420**	4,531	4,644	**4,641**	4,757	4,876	**4,873**	4,995	5,120	**5,117**	5,245	5,376
Research Technician		**4,210**	4,315	4,423	**4,420**	4,531	4,644	**4,641**	4,757	4,876	**4,873**	4,995	5,120	**5,117**	5,245	5,376
Analyst I	4	**4,420**	4,531	4,644	**4,641**	4,757	4,876	**4,873**	4,995	5,120	**5,117**	5,245	5,376	**5,373**	5,507	5,645
Analyst II	5	**5,117**	5,245	5,376	**5,373**	5,507	5,645	**5,641**	5,782	5,927	**5,923**	6,072	6,223	**6,220**	6,375	6,535
Graphic Designer		**5,117**	5,245	5,376	**5,373**	5,507	5,645	**5,641**	5,782	5,927	**5,923**	6,072	6,223	**6,220**	6,375	6,535
Accountant	6	**5,923**	6,072	6,223	**6,220**	6,375	6,535	**6,531**	6,694	6,861	**6,857**	7,029	7,204	**7,200**	7,380	7,565
Associate Analyst		**5,923**	6,072	6,223	**6,220**	6,375	6,535	**6,531**	6,694	6,861	**6,857**	7,029	7,204	**7,200**	7,380	7,565
Clerk of the Board/Executive Assistant		**5,923**	6,072	6,223	**6,220**	6,375	6,535	**6,531**	6,694	6,861	**6,857**	7,029	7,204	**7,200**	7,380	7,565
Senior Analyst	7	**6,857**	7,029	7,204	**7,200**	7,380	7,565	**7,560**	7,749	7,943	**7,938**	8,136	8,340	**8,335**	8,543	8,757
Information Technology Administrator		**6,857**	7,029	7,204	**7,200**	7,380	7,565	**7,560**	7,749	7,943	**7,938**	8,136	8,340	**8,335**	8,543	8,757
Manager		**7,938**	8,136	8,340	**9,671**	9,913	10,161	**11,404**	11,689	11,981	**13,137**	13,465	13,802	**14,870**	15,242	15,623
Steps within this range are for illustrative pursposes only; salaries are determined by individual employment agreement within the range.																
Chief Operating Officer/Gen Counsel		**17,697**	18,139	18,593	**19,113**	19,591	20,081	**20,644**	21,160	21,689	**22,295**	22,852	23,424	**24,077**	24,679	25,296
Chief Executive Officer		**17,697**	18,139	18,593	**19,113**	19,591	20,081	**20,644**	21,160	21,689	**22,295**	22,852	23,424	**24,077**	24,679	25,296
Steps within these ranges are for illustrative purposes only; salaries are determined by individual employment agreement within the range.																

Notes:

Regular full-time employees are paid a monthly salary based on this schedule.

Longevity pay is 2.5% for employees with 13 years of FTE service and 2.5% + 2.5% for employees with 18 years of FTE service.

The salary range for the COO/General Counsel and CEO includes contractual benefits; the base salary range for these positions is approximately $15,557 to $21,044