

REGIONAL TRANSIT ISSUE PAPER

| Agenda Item No. | Board Meeting Date | Open/Closed Session | Information/Action Item | Issue Date |
|-----------------|--------------------|---------------------|-------------------------|------------|
| 18 | 06/24/13 | Open | Action | 06/19/13 |

Subject: Approving Modified and New Job Descriptions and the District's Authorized Classifications, Positions and Salary Grades

ISSUE

Whether or not to approve modified and new job descriptions and the District's Authorized Classifications, Positions and Salary Grades.

RECOMMENDED ACTION

Adopt Resolution No. 13-06- _____, Amending Exhibit A of Resolution No. 13-02-0019, and Approving Modified and New Job Descriptions and the District's Authorized Classifications, Positions and Salary Grades.

FISCAL IMPACT

There is no additional fiscal impact as a result of this action. Positions noted throughout this report were funded within the FY 2014 Operating Budget adopted on June 24, 2013.

DISCUSSION

Personnel Action Summary: This proposed action will result in the modifications to 5 existing job descriptions (Risk Administrator, Risk Analyst I, Risk Analyst II, Senior Engineering Analyst, and Senior Risk Analyst) and 2 new job descriptions (Engineering Analyst I and Engineering Analyst II). The discussion also provides justification for the elimination of 5 vacant authorized Transit Officer positions, and the addition of 3 Facilities Maintenance Mechanics positions, 1 Storekeeper position, 1 Maintenance Supervisor-Light Rail position, 1 Maintenance Supervisor-Wayside position, 1 Light Rail Assistant Mechanic position, 6 Light Rail Vehicle Technician positions and 4 Lineworker III positions to the District's number of authorized positions as adopted with Regional Transit's FY 2014 Operating Budget.

Changes to the total number of authorized positions associated with this item are reflected in the Authorized Classifications, Positions and Salary Grades list (Authorized Positions List), attached to the Resolution as Exhibit A, and the fiscal impact associated with these changes is reflected in RT's adopted FY 2014 Operating Budget. The modified and new job descriptions are attached to the Resolution as Exhibit B.

Administrative Services Division
Risk Management Unit

Staff recently conducted a thorough job analysis and benchmarking of RT's Risk Management job descriptions and determined that because of significant changes to the unit's responsibilities and programs, including the development and maintenance of the District's Owner Controlled

Approved:

Presented:

Final 06/19/13
General Manager/CEO

Director, Human Resources

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Insurance Program (OCIP), all of the existing job descriptions in the unit needed to be revised and updated to capture these new responsibilities. Changes to the job description titles and essential functions have been made and the JET determined that the compensable factors for these revised job descriptions have not changed; therefore, there is no change to the salary grades for these positions.

The modified and retitled job descriptions for the Risk Administrator, Risk Analyst I, Risk Analyst II, and Senior Risk Analyst are reflected in the Authorized Positions List and are attached to the Resolution as Exhibit B. There is no fiscal impact associated with this change.

Engineering and Construction Division
Project Management Department

The Engineering and Construction Division recently requested that HR staff conduct a job analysis for the Senior Project Control Engineer job classification with the intent to develop a job series for the position.

Staff conducted a thorough job analysis and benchmarking of those job responsibilities and has developed a job series for an Engineering Analyst I, grade 205, an Engineering Analyst II, grade 207, and has retitled the existing Senior Project Control Engineer classification to Senior Engineering Analyst, grade 109. This job series will provide both technical and analytical support to the Engineering Division and is consistent with other department/division analyst positions.

The essential functions for the Senior Engineering Analyst job includes the ability to supervise lower level staff; however the JET determined that the compensable factors for this position have not changed; therefore, there is no change to the salary grade for the position.

The modified and retitled Senior Engineering Analyst job description and the new Engineering Analyst I and Engineering Analyst II job descriptions are included in the Authorized Positions List and are attached to the Resolution as Exhibit B. There is no fiscal impact associated with this change.

Facilities and Business Support Services Division
Facilities Department

During the FY 2014 budget preparation process, the Facilities Department determined that the addition of 3 Facilities Maintenance Mechanic positions is necessary to provide support to the department. These positions will replace 3 Personal Service Contractors currently working on RT's capital projects. Approximately 90% of the costs of these additional positions for FY 2014 will be paid with capital funding.

The FY 2014 budget adds 3 additional Facilities Maintenance Mechanic positions to the Authorized Positions List.

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Procurement Department

As the result of an IBEW grievance settlement for the Storekeeper classification relevant to Article 4, Section 4.5, 1 additional Storekeeper position has been added to the Authorized Position List to provide future support in the Procurement Department.

Operations Division
Light Rail Department

During the FY 2014 budget preparation process, staff determined that in order to support the Light Rail Blue Line Extension project, additional staffing would be required. The Authorized Positions List for FY 2014 includes 13 additional positions to support the Blue Line as follows: One additional Maintenance Supervisor-Light Rail position, 1 additional Maintenance Supervisor-Wayside position, 1 additional Light Rail Assistant Mechanic position, 6 additional Light Rail Vehicle Technician positions and 4 additional Lineworker III positions.

Police Services Department

During the FY 2014 budget preparation process, staff determined that in order to better enhance RT's security on its system, 4 sworn police officers would be added to provide security services under contract with the City of Sacramento. To offset the cost of the added police officers, staff recommends eliminating 5 vacant Transit Officer positions from the Authorized Positions List for FY 2014.

Authorized Classifications, Positions and Salary Grades and Values

Changes to position control described above are reflected in the Authorized Classifications, Positions and Salary Grades list (Authorized Positions List), attached to the Resolution as Exhibit A.

Exhibit A also reflects a change to the Network Operations Technician classification which moved from Administrative Employees Association (AEA) into the American Federation of State, County and Municipal Employees (AFSCME) group through the labor negotiations process and approved by staff on March 8, 2013.

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Modified and New Job Descriptions

The below listed job descriptions are attached to the Resolution as Exhibit B.

| <u>Previous Job Title</u> | <u>Disposition</u> | <u>Modified and New Job Title</u> |
|---------------------------------|--------------------|-----------------------------------|
| NA | New | Engineering Analyst I |
| NA | New | Engineering Analyst II |
| Risk / Claims Administrator | Modified | Risk Administrator |
| Claims Analyst I | Modified | Risk Analyst I |
| Claims Analyst II | Modified | Risk Analyst II |
| Senior Project Control Engineer | Modified | Senior Engineering Analyst |
| Senior Claims Analyst | Modified | Senior Risk Analyst |

Staff recommends approval of this action.

RESOLUTION NO. 13-06-_____

Adopted by the Board of Directors of the Sacramento Regional Transit District on this date:

June 24, 2013

**AMENDING EXHIBIT A OF RESOLUTION NO. 13-02-0019 AND APPROVING
MODIFIED AND NEW JOB DESCRIPTIONS AND THE DISTRICT'S AUTHORIZED
CLASSIFICATIONS, POSITIONS AND SALARY GRADES**

BE IT HEREBY RESOLVED BY THE BOARD OF DIRECTORS OF THE
SACRAMENTO REGIONAL TRANSIT DISTRICT AS FOLLOWS:

THAT, effective July 1, 2013, Resolution No. 13-02-0019 is hereby amended by deleting Exhibit A and replacing it with attached Exhibit A "Authorized Classification, Positions and Salary Grades."

THAT, effective July 1, 2013, the modified and retitled job descriptions of Risk Administrator, Risk Analyst I, Risk Analyst II, Senior Engineering Analyst, and Senior Risk Analyst; and the new job descriptions of Engineering Analyst I and Engineering Analyst II, attached as Exhibit B, are hereby approved.

PATRICK HUME, Chair

A T T E S T:

MICHAEL R. WILEY, Secretary

By: _____
Cindy Brooks, Assistant Secretary

EXHIBIT A
Effective July 1, 2013
AUTHORIZED CLASSIFICATIONS, POSITIONS, AND SALARY GRADES

| <u>Job Classification Titles</u> | <u>Authorized Positions</u> | <u>Grade</u> |
|--|-----------------------------|--------------|
| <u>AEA Family:</u> | | |
| Accountant I | 0 | 205 |
| Accountant II | 0 | 108 |
| Assistant Architect | 0 | 206 |
| Assistant Engineer | 0 | 208 |
| Assistant Planner | 2 | 207 |
| Assistant Resident Engineer | 2 | 208 |
| Associate Architect | 1 | 109 |
| Associate Civil Engineer | 1 | 110 |
| Associate Engineer | 0 | 109 |
| Associate Systems Engineer | 2 | 110 |
| * Engineering Analyst I | 0 | 205 |
| * Engineering Analyst II | 0 | 207 |
| Engineering Technician | 1 | 205 |
| Grants Analyst | 0 | 206 |
| Human Resources Trainer | 0 | 206 |
| Information Technology Business Systems Analyst | 0 | 107 |
| Inspector | 0 | 204 |
| Junior Engineer | 0 | 205 |
| Long Range Planner | 1 | 208 |
| Payroll Analyst | 1 | 204 |
| Procurement Analyst I | 0 | 205 |
| Procurement Analyst II | 4 | 207 |
| Programmer Analyst I | 0 | 205 |
| Programmer Analyst II | 0 | 208 |
| Quality Assurance Specialist I | 0 | 202 |
| Quality Assurance Specialist II | 0 | 205 |
| Real Estate Analyst I | 0 | 205 |
| Real Estate Analyst II | 0 | 207 |
| Resident Engineer | 0 | 110 |
| Revenue Analyst | 1 | 207 |
| Schedule Analyst I | 1 | 205 |
| Schedule Analyst II | 2 | 207 |
| Senior Accountant | 2 | 109 |
| Senior Architect | 1 | 111 |
| Senior Civil Engineer | 1 | 111 |
| Senior Community and Government Affairs Officer | 2 | 108 |
| * Senior Engineering Analyst | 1 | 109 |
| Senior Engineering Technician | 1 | 207 |
| Senior Grants Analyst | 2 | 108 |
| Senior Information Technology Business Systems Analyst | 2 | 109 |
| Senior Marketing and Communications Specialist | 1 | 108 |
| Senior Planner | 0 | 109 |
| Senior Procurement Analyst | 3 | 109 |
| Senior Programmer Analyst | 2 | 109 |
| Senior Quality Assurance Specialist | 1 | 108 |
| Senior Real Estate Analyst | 0 | 108 |

* Denotes Change in Classification/Count
(1) Increase in Position(s)
(2) Decrease in Position(s)
** No Grade, Salary by Employment Contract
*** No Grade, Salary Stated in MOU

| <u>Job Classification Titles</u> | <u>Authorized Positions</u> | <u>Grade</u> |
|--|-----------------------------|--------------|
| Senior Systems Engineer | 1 | 111 |
| Service Planner | 1 | 208 |
| Vehicle Equipment Maintenance Specialist | 0 | 207 |
| Video Communications Systems Analyst | 2 | 208 |
| Total General Family Allocations: | 42 | |

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(2) Decrease in Position(s)
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| <u>Job Classification Titles</u> | <u>Authorized Positions</u> | <u>Grade</u> |
|---|-----------------------------|--------------|
| <u>MANAGEMENT & CONFIDENTIAL FAMILY:</u> | | |
| Accessible Services Administrator | 1 | 110 |
| Administrative Assistant I (<i>GM & Legal Cost Centers</i>) | 0 | 200 |
| Administrative Assistant II (<i>GM & Legal Cost Centers</i>) | 1 | 202 |
| Administrative Technician (<i>Employee Relations Cost Center</i>) | 1 | 204 |
| AGM of Engineering and Construction | 1 | IV |
| AGM of Marketing and Communications | 1 | III |
| AGM of Planning and Transit System Development | 1 | III |
| Attorney I | 0 | 108 |
| Attorney II | 0 | 110 |
| Attorney III | 3 | 112 |
| Benefits Administrator | 0 | 110 |
| Chief Administrative Officer | 1 | III |
| Chief Counsel | 1 | ** |
| Chief Financial Officer | 1 | IV |
| Chief of Facilities and Business Support Services | 1 | III |
| Chief Operating Officer | 1 | V |
| Clerk to the Board | 1 | 208 |
| Community Bus Services Superintendent | 0 | 110 |
| Compliance and Quality Assurance Auditor | 1 | 112 |
| Deputy General Manager | 0 | VI |
| Director, Accessible Services and Customer Advocacy | 1 | 112 |
| Director, Bus Maintenance | 1 | 112 |
| Director, Civil and Track Design | 1 | 113 |
| Director, Community Bus Services | 1 | 112 |
| Director, Construction Management | 1 | 112 |
| Director, Facilities | 1 | 112 |
| Director, Finance and Treasury | 1 | 112 |
| Director, Human Resources | 1 | 112 |
| Director, Information Technology | 1 | 112 |
| Director, Labor Relations | 1 | 112 |
| Director, Light Rail | 1 | 113 |
| Director, Long Range Planning | 1 | 112 |
| Director, Office Management and Budget | 1 | 112 |
| Director, Planning | 1 | 112 |
| Director, Procurement Services | 1 | 112 |
| Director, Project Management | 1 | 112 |
| Director, Real Estate | 0 | 112 |
| Director, Safety | 1 | 112 |
| Director, Scheduling | 1 | 112 |
| Director, Systems Design | 0 | 113 |
| Director, Transportation | 1 | 112 |
| EEO Administrator | 1 | 110 |
| Executive Assistant | 1 | 207 |
| General Manager/CEO | 1 | ** |
| Human Resources Analyst I | 1 | 205 |
| Human Resources Analyst II | 1 | 208 |
| Information Technology Service and Support Administrator | 1 | 110 |
| Labor Relations Analyst I | 0 | 205 |

* Denotes Change in Classification/Count

(1) Increase in Position(s)

(2) Decrease in Position(s)

** No Grade, Salary by Employment Contract

*** No Grade, Salary Stated in MOU

| <u>Job Classification Titles</u> | <u>Authorized Positions</u> | <u>Grade</u> |
|--|-----------------------------|--------------|
| Labor Relations Analyst II | 0 | 208 |
| Legal Secretary | 1 | 204 |
| Maintenance Superintendent - Bus | 1 | 111 |
| Maintenance Superintendent - Light Rail | 1 | 111 |
| Maintenance Superintendent - Wayside | 1 | 111 |
| Manager, Accounting | 1 | 110 |
| Manager, Community and Governmental Affairs | 0 | 111 |
| Manager, Contracts and Disadvantaged Business Enterprise | 1 | 110 |
| Manager, Customer Service | 1 | 110 |
| Manager, Enterprise Resources and Databases | 1 | 111 |
| Manager, Grants | 1 | 110 |
| Manager, Marketing and Communications | 1 | 111 |
| Manager, Quality Assurance | 0 | 111 |
| Manager, Revenue | 1 | 110 |
| Materiel Management Superintendent | 3 | 110 |
| Network Operations Administrator | 1 | 110 |
| Operations Training Administrator | 0 | 110 |
| Paralegal | 0 | 205 |
| Payroll Supervisor | 1 | 109 |
| Principal Planner | 1 | 110 |
| Principal Civil Engineer | 0 | 112 |
| Principal Systems Engineer | 0 | 112 |
| Purchasing and Materials Administrator | 1 | 110 |
| Quality Assurance Administrator | 1 | 110 |
| Real Estate Administrator - Acquisitions | 0 | 109 |
| Real Estate Administrator - Asset Management | 1 | 109 |
| Real Estate Administrator - Transit Oriented Development and Joint Development | 0 | 109 |
| Recruitment and Selection Administrator | 1 | 110 |
| * Risk Administrator | 1 | 110 |
| * Risk Analyst I | 0 | 204 |
| * Risk Analyst II | 1 | 207 |
| Senior Administrative Assistant | 5 | 206 |
| Senior Attorney | 2 | 113 |
| Senior Classification and Compensation Analyst | 0 | 108 |
| Senior Financial Analyst | 3 | 108 |
| Senior Human Resources Analyst | 5 | 109 |
| Senior Labor Relations Analyst | 2 | 109 |
| Senior Paralegal | 2 | 207 |
| * Senior Risk Analyst | 1 | 109 |
| Senior Schedule Analyst | 0 | 108 |
| Transportation Superintendent - Bus | 3 | 110 |
| Transportation Superintendent - Light Rail | 2 | 110 |
| Total Management and Confidential Allocations: | | 89 |
| Total District-wide Salaried Allocations: | | 131 |

* Denotes Change in Classification/Count
(1) Increase in Position(s)
(2) Decrease in Position(s)
** No Grade, Salary by Employment Contract
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| <u>Job Classification Titles</u> | <u>Authorized Positions</u> | <u>Grade</u> |
|--|-----------------------------|--------------|
| <u>AFSCME 146 Family:</u> | | |
| Accessible Services Eligibility Specialist | 3 | 205 |
| Administrative Assistant I | 0 | 200 |
| Administrative Assistant II | 11 | 202 |
| Administrative Supervisor | 1 | *** |
| Administrative Technician | 14 | 204 |
| Community Bus Services Dispatcher Supervisor | 5 | *** |
| Customer Advocacy Supervisor | 1 | *** |
| Customer Advocate I | 2 | 201 |
| Customer Service Supervisor | 1 | *** |
| Facilities Supervisor | 3 | *** |
| Graphic Designer | 2 | 205 |
| Information Technology Project Coordinator | 1 | 109 |
| Information Technology Technician I | 0 | 205 |
| Information Technology Technician II | 1 | 206 |
| Maintenance Supervisor - Bus | 8 | *** |
| *(1) Maintenance Supervisor - Light Rail | 10 | *** |
| *(1) Maintenance Supervisor - Wayside | 5 | *** |
| Maintenance Trainer - Bus | 1 | *** |
| Maintenance Trainer - Light Rail | 1 | *** |
| Marketing and Communications Specialist | 1 | 206 |
| Network Operations Engineer | 1 | 208 |
| * Network Operations Technician | 2 | 205 |
| Operations Trainer | 4 | 209 |
| Route Check Supervisor | 0 | *** |
| Route Checker | 4 | 200 |
| Safety Specialist I | 0 | 205 |
| Safety Specialist II | 0 | 207 |
| Senior Customer Advocate | 1 | 205 |
| Senior Facilities Specialist | 2 | 109 |
| Senior Inspector | 1 | 206 |
| Senior Safety Specialist | 2 | 109 |
| Transit Officer Supervisor | 1 | *** |
| Transportation Supervisor | 49 | |
| <u>Total AFSCME 146 Allocations:</u> | <u>138</u> | |
| <u>ATU 256 Family:</u> | | |
| Accounting Technician | 1 | *** |
| Claims Technician | 1 | *** |
| Clerk II | 10 | *** |
| Computer Technician | 0 | *** |
| Customer Service Representative II | 14 | *** |
| Customer Service Representative III | 1 | *** |
| Operators (CBS, Bus and Light Rail combined) | 457 | *** |
| Payroll Technician | 1 | *** |
| Senior Clerk | 1 | *** |
| *(2) Transit Officer | 13 | *** |
| <u>Total ATU 254 Allocations:</u> | <u>499</u> | |

* Denotes Change in Classification/Count

(1) Increase in Position(s)

(2) Decrease in Position(s)

** No Grade, Salary by Employment Contract

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| <u>Job Classification Titles</u> | <u>Authorized Positions</u> | <u>Grade</u> |
|--|-----------------------------|--------------|
| IBEW 1245 Family: | | |
| Bus Service Worker | 29 | *** |
| Electronic Mechanic | 2 | *** |
| Facilities and Grounds Worker I | 2 | *** |
| Facilities and Grounds Worker II | 4 | *** |
| Facilities Electronic Technician | 1 | *** |
| *(1) Facilities Maintenance Mechanic | 16 | *** |
| Facilities Service Worker | 9 | *** |
| *(1) Light Rail Assistant Mechanic | 7 | *** |
| Light Rail Service Worker | 20 | *** |
| *(1) Light Rail Vehicle Technician | 38 | *** |
| Lineworker I | 0 | *** |
| Lineworker II | 0 | *** |
| *(1) Lineworker III | 20 | *** |
| Mechanic A | 26 | *** |
| Mechanic A (Body/Fender) | 6 | *** |
| Mechanic A (Gasoline/Propane) | 2 | *** |
| Mechanic B | 8 | *** |
| Mechanic C | 17 | *** |
| Painter | 2 | *** |
| Rail Laborer | 2 | *** |
| Rail Maintenance Worker | 8 | *** |
| Senior Mechanic | 0 | *** |
| Senior Rail Maintenance Worker | 1 | *** |
| *(1) Storekeeper | 10 | *** |
| Upholsterer | 1 | *** |
| Total IBEW 1245 Allocations: | 231 | |
| TOTAL OVERALL AUTHORIZED ALLOCATIONS: | | 999 |

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Salaried Classification Series

Note: A vacancy occurring within a salaried classification series may be filled at the same level as that vacated or at any lower level provided that only the one vacancy is filled.

Accessible Services Eligibility Specialist, Administrator
Accountant I, II, Senior
Administrative Assistant I, II, Technician, Senior, Supervisor
Assistant Architect, Associate, Senior
Assistant Planner, Service Planner, Long Range Planner, Senior, Principal
Attorney I, II, III, Senior
Customer Advocate I, Senior
Engineering Analyst I, II, Senior
Engineering Technician, Senior
Grants Analyst, Senior
Human Resources Analyst I, II, Senior
Information Technology Technician I, II, IT Service and Support Administrator
Inspector, Senior Inspector, Assistant Resident Engineer, Resident Engineer
IT Business Systems Analyst, Senior
Junior Engineer, Assistant, Associate, Associate Civil, Senior, Principal
Junior Engineer, Assistant, Associate, Associate Systems, Senior, Principal
Labor Relations Analyst I, II, Senior
Marketing and Communications Specialist, Senior
Network Operations Technician, Network Operations Engineer, Network Operations Administrator
Network Operations Technician, Video Communications Systems Analyst, Network Operations Administrator
Paralegal, Senior
Payroll Analyst, Supervisor
Procurement Analyst I, II, Senior
Programmer Analyst I, II, Senior
Quality Assurance Specialist I, II, Senior, Administrator
Real Estate Analyst I, II, Senior, Administrator
Risk, Analyst I, II, Senior, Administrator
Safety Specialist I, II, Senior
Schedule Analyst I, II, Senior

EXHIBIT B
List of Modified / New Job Descriptions
Effective July 1, 2013

| Job Description - Previous Title | Disposition | Job Description - Modified / New Title |
|---|--------------------|---|
| NA | New | Engineering Analyst I |
| NA | New | Engineering Analyst II |
| Risk / Claims Administrator | Modified | Risk Administrator |
| Claims Analyst I | Modified | Risk Analyst I |
| Claims Analyst II | Modified | Risk Analyst II |
| Senior Project Control Engineer | Modified | Senior Engineering Analyst |
| Senior Claims Analyst | Modified | Senior Risk Analyst |



Title: Engineering Analyst I

FLSA Status: Non-Exempt

BRIEF DESCRIPTION:

The purpose of this position is to provide entry level analytical and data reporting support for the District’s capital and maintenance programs for project control scope, cost and schedule management. This is accomplished by assisting with updating project schedules, monitoring project cash flow, reviewing project cost estimates, updating project reports and status, coordinating project funding updates and budget transfers, performing basic analysis of project data, assisting project and contract managers in tracking expenditures against approved budgets, preparing issue papers and data reporting. Other duties may include participating in project construction meetings, observing project field construction progress and providing basic support to construction management staff with contract payments and change orders.

ESSENTIAL FUNCTIONS:

Note: This information is intended to be descriptive of the key responsibilities of the position. The list of essential functions below does not identify all duties performed by any single incumbent in this position. Additionally, please be aware of the legend below when referring to the physical demands of each essential function.

| (S) Sedentary | (L) Light | (M) Medium | (H) Heavy | (V) Very Heavy |
|---|---|---|---|--|
| Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | Exerting up to 20 lbs. occasionally; 10 lbs. frequently; or negligible amounts constantly; OR requires walking or standing to a significant degree. | Exerting 20-50 lbs. occasionally; 10-25 lbs. frequently; or up to 10 lbs. constantly. | Exerting 50-100 lbs. occasionally; 10-25 lbs. frequently; or up to 10-20 lbs. constantly. | Exerting over 100 lbs. occasionally; 50-100 lbs. frequently; or up to 20-50 lbs. constantly. |

| # | Code | Essential Functions | % of Time |
|---|------|--|-----------|
| 1 | S | Assist with the collection of project schedule and cost estimate data, tracking and monitoring contract amendments and invoices; updating project report status, cost and schedule; providing project managers with project cost, schedule and forecast information and analysis; developing project management reports for capital projects; monitoring and coordinating project funding cash flow; preparing project closeout reports detailing scope, cost and schedule deviations. Assist with updating the Capital Improvement Plan. Prepare correspondence, issue papers and technical reports. Perform other related administrative and reporting duties as assigned. | 40% |
| 2 | S | Research current project cost estimates and schedules to provide to project team members; assist in the implementation of project specific documentation and project control procedures; review and monitor procedural compliance and review project cost estimates for consistency between various design disciplines. Provide finance staff with project funding updates and budget transfers. Perform other related scope, cost and schedule management duties as assigned. | 25% |



| | | | |
|---|---|---|-----|
| 3 | S | Assist division staff with departmental budget analysis; review and analyze contractor/consultant submittals; assist division staff by developing spreadsheets and databases to track project information. Perform other related project and data reporting duties as assigned. | 20% |
| 4 | S | Assist in tracking and monitoring change orders; developing project management reports for capital projects; documenting construction schedule and cost deviations and providing recordkeeping documents when requested for contractor claims. Assist construction management staff in processing and tracking contractor payment requests. Attend construction meetings and conduct field observations to track construction progress, as needed. Perform other related construction support duties as assigned. | 15% |



JOB REQUIREMENTS:

| -Description of Minimum Job Requirements- | |
|---|--|
| Formal Education | <p>Work requires broad knowledge in a general professional or technical field. Knowledge is normally acquired through four (4) years of an accredited college or university resulting in a Bachelor's degree or equivalent in Engineering, Business, Construction Management, Business Administration, Public Administration or a closely related field.</p> <p>Additional directly related experience beyond the minimum requirement may substitute for the required education based on the ratio of one and a half (1.5) years of experience for each (1) year of education.</p> |
| Experience | <p>A minimum of one (1) year of experience performing technical or professional support for engineering and construction management related activities. Experience in transportation or transit projects is preferred.</p> |
| Supervision | <p>Work requires the occasional direction of helpers, assistants, seasonal employees, interns, or temporary employees.</p> |
| Human Collaboration Skills | <p>Work may require providing advice to others outside direct reporting relationships on specific problems or general policies. Contacts may require the consideration of different points of view to reach agreement. Elements of persuasion may be necessary to gain cooperation and acceptance of ideas.</p> |
| Freedom to Act | <p>The employee normally performs the duty assignment after receiving general instructions as to methods, procedures, and desired end results. There is some opportunity for discretion when making selections among a few, easily identifiable choices. The assignment is usually reviewed upon completion.</p> |
| Technical Skills | <p>Skilled: Work requires a comprehensive, practical knowledge of a technical field with use of analytical judgment and decision-making abilities appropriate to the work environment of the organization.</p> |
| Budget Responsibility | <p>Position has limited fiscal responsibility. May assist in the collection of data in support of recommendations for departmental budget allocations. May monitor division or program/project level budget and expenditures.</p> |
| Reading | <p>Intermediate - Ability to read papers, periodicals, journals, manuals, dictionaries, thesauruses, and encyclopedias. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study.</p> |
| Math | <p>Intermediate - Ability to deal with a system of real numbers; and practical application of fractions, percentages, ratios/proportions and measurement. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study.</p> |
| Writing | <p>Intermediate - Ability to write reports, prepare business letters, expositions, and summaries with proper format, punctuation, spelling, and grammar, using all parts of speech. Ordinarily, such education is</p> |



| |
|---|
| <p>obtained in high school up to college. However, it may be obtained from experience and self-study.</p> |
| <p>Certification & Other Requirements</p> |

| KNOWLEDGE |
|---|
| <ul style="list-style-type: none"> • Basic statistical analysis. • Methods and techniques of tracking, recording and presenting statistical data. • English grammar, punctuation, spelling and usage. • Basic principles and practices of contract administration. • Practical application of computers and peripheral equipment. • Problem solving and communication skills. • Production of database reports. • Report and business correspondence. |

| SKILLS |
|--|
| <ul style="list-style-type: none"> • Intermediate word processing, spreadsheet, presentation and database software. • Specialized software related to functional area. |

| ABILITIES |
|---|
| <ul style="list-style-type: none"> • Learn Federal, State and local agency funding application requirements. • Learn current/local costs for estimating labor, materials and equipment. • Learn processes involved in the completion of environmental studies, design, right of way acquisition, construction and construction management. • Learn standard project reports to monitor schedule progress, expenditures, variances and exceptions. • Effectively present information and respond to questions from others. • Prioritize and deal with conflicting workload requirements. • Learn Enterprise Resource Planning software, DataWarehouse, SAP project system and related modules. • Understand project budget allocation and budget release processes. • Update project status reports including cost and schedule analysis. • Resolve budget differences between Finance and program control data. • Ensure timely funding and budget transfers. • Ensure timely creation of purchase requisitions and purchase orders. • Work with Division staff to review and update project schedules and cost estimates. • Develop a scope of services for procurement of professional consultant services. • Learn project management and control principles and systems. • Learn project cost and schedule development best practices. • Learn project scheduling practices and principles. • Learn project metrics to develop cost and resource loaded baseline schedules. • Learn project life cycle of conceptualization, planning, execution, and termination. |



- Learn standard project reports to monitor schedule progress, expenditures, variances, and exceptions.
- Learn funding allocation processes.
- Learn Federal contracting requirements and cost accounting standards.
- Learn Division and District business practices and procedures.
- Learn District construction practices and reporting requirements.
- Learn District policies, procedures and practices.
- Deal with difficult people and situations.
- Organize information clearly and precisely.
- Communicate clearly and effectively, both orally and in writing, with internal and external contacts.
- Interact professionally with District employees and outside agency representatives.



OVERALL PHYSICAL STRENGTH DEMANDS:

-Physical strength for this position is indicated below with “X”-

| Sedentary | Light | Medium | Heavy | Very Heavy |
|---|--|---|---|--|
| X | | | | |
| Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree. | Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly. | Exerting 50-100 lbs. occasionally, 10-25 lbs. frequently, or up to 10-20 lbs. constantly. | Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly. |

PHYSICAL DEMANDS:

| C | F | O | R | N |
|---|---|---|---|-------------------------------|
| Continuously 2/3 or more of the time. | Frequently From 1/3 to 2/3 of the time. | Occasionally Up to 1/3 of the time. | Rarely Less than 1 hour per week. | Never Never occurs. |

Note: This is intended as a description of the way the job is currently performed. It does not address the potential for accommodation.

| -Physical Demand- | -Frequency- | -Brief Description- |
|---------------------------------|-------------|---|
| Standing | O | Making presentations; observing work site; observing work duties; communicating with co-workers |
| Sitting | C | Desk work; meetings; driving |
| Walking | O | To other departments/offices; around work site |
| Lifting | R | Supplies; files |
| Carrying | R | Supplies; files |
| Pushing/Pulling | R | File drawers; tables and chairs |
| Reaching | R | For supplies; for files |
| Handling | O | Paperwork |
| Fine Dexterity | C | Computer keyboard; telephone keypad; calculator |
| Kneeling | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crouching | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crawling | R | Under equipment |
| Bending | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Twisting | R | From computer to telephone; getting inside vehicle |
| Climbing | R | Stairs |
| Balancing | N | |
| Vision | C | Reading; computer screen; driving; observing work site |
| Hearing | F | Communicating via telephone/radio; to co-workers/public |
| Talking | O | Communicating via telephone/radio; to co-workers/public |
| Foot Controls | R | Driving |
| Other (specified if applicable) | | None |

MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, copier, fax machine, calculator, vehicle, computer and associated hardware and software.



ENVIRONMENTAL FACTORS:

| | | | | |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|
| C Continuously | F Frequently | O Occasionally | R Rarely | N Never |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|

| | | | | |
|-------------------|------------------------------------|-------------------------------------|------------------------|-------------------|
| D Daily | W Several Times Per Week | M Several Times Per Month | S Seasonally | N Never |
|-------------------|------------------------------------|-------------------------------------|------------------------|-------------------|

| -Health and Safety Factors- | |
|-----------------------------|---|
| Mechanical Hazards | N |
| Chemical Hazards | N |
| Electrical Hazards | N |
| Fire Hazards | N |
| Explosives | N |
| Communicable Diseases | N |
| Physical Danger or Abuse | N |
| Other (see 1 below) | N |

| -Environmental Factors- | |
|-------------------------|---|
| Respiratory Hazards | N |
| Extreme Temperatures | N |
| Noise and Vibration | N |
| Wetness/Humidity | N |
| Physical Hazards | N |

(1) N/A

PROTECTIVE EQUIPMENT REQUIRED:

Safety shoes, protective eyewear, safety vest, hard hat only if performing occasional field observations.

NON-PHYSICAL DEMANDS:

| | | | |
|---|---|---|-----------------------------------|
| F Frequently From 1/3 to 2/3 of the time | O Occasionally Up to 1/3 of the time | R Rarely Less than 1 hour per week | N Never Never occurs |
|---|---|---|-----------------------------------|

| -Description of Non-Physical Demands- | -Frequency- |
|---|-------------|
| Time Pressure | O |
| Emergency Situation | R |
| Frequent Change of Tasks | F |
| Irregular Work Schedule/Overtime | R |
| Performing Multiple Tasks Simultaneously | F |
| Working Closely with Others as Part of a Team | F |
| Tedious or Exacting Work | O |
| Noisy/Distracting Environment | R |
| Other (see 2 below) | |

(2) N/A

PRIMARY WORK LOCATION:

| | | | |
|--------------------------------|---|---------------------|--|
| Office Environment | X | Vehicle | |
| Warehouse | | Outdoors | |
| Shop | | Other (see 3 below) | |
| Recreation/Neighborhood Center | | | |

(3)N/A

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required. This description is subject to modification as the needs and requirements of the position change.



Title: Engineering Analyst II

FLSA Status: Non-Exempt

BRIEF DESCRIPTION:

The purpose of this position is to provide journey level analytical and data reporting support for the District’s capital and maintenance programs, including complex projects, through scope, cost and schedule management. This is accomplished by developing project schedules and cash flow, reviewing project cost estimates, developing and updating project status reports, developing project work breakdown structure and allocating funding based upon direction from project manager, coordinating project funding updates and budget transfers with Finance staff, performing project data analysis, assisting project and contract managers in tracking expenditures against approved budget, preparing issue papers and data reporting. Other duties include participating in project construction meetings, observing project field construction progress, providing informal direction to administrative staff, tracking contract payments, change orders, requests for information and submittal status.

ESSENTIAL FUNCTIONS:

Note: This information is intended to be descriptive of the key responsibilities of the position. The list of essential functions below does not identify all duties performed by any single incumbent in this position. Additionally, please be aware of the legend below when referring to the physical demands of each essential function.

| | | | | |
|---|---|--|---|---|
| (S) Sedentary Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | (L) Light Exerting up to 20 lbs. occasionally; 10 lbs. frequently; or negligible amounts constantly; OR requires walking or standing to a significant degree. | (M) Medium Exerting 20-50 lbs. occasionally; 10-25 lbs. frequently; or up to 10 lbs. constantly. | (H) Heavy Exerting 50-100 lbs. occasionally; 10-25 lbs. frequently; or up to 10-20 lbs. constantly. | (V) Very Heavy Exerting over 100 lbs. occasionally; 50-100 lbs. frequently; or up to 20-50 lbs. constantly. |
|---|---|--|---|---|

| # | Code | Essential Functions | % of Time |
|---|------|--|-----------|
| 1 | S | Develop and review project schedules; develop project work breakdown structures; develop project cash flow and management plans; review project cost estimates; manage project budget information; coordinate project funding updates and budget transfers; develop project and document control procedures; develop project management reports for capital projects; and assist with updating the Capital Improvement Plan. Perform other related scope, cost and schedule management duties as assigned. | 50% |
| 2 | S | Collect project schedule and cost estimate data; develop and update project report status, cost and schedule; provide project managers with project cost, schedule and forecast information and analysis; monitor and coordinate project funding cash flow; prepare project closeout reports detailing scope, cost and schedule deviations; and track and monitor contract amendments and invoices. Prepare correspondence, issue papers and technical reports. Perform other related administrative and reporting duties as assigned. | 20% |



| | | | |
|---|---|--|-----|
| 3 | S | Provide project managers with project cost and schedule analysis; assist with analyzing departmental budgets; review and analyze contractor/consultant submittals; and develop spreadsheets and databases to track project information. Perform other related project data analysis duties as assigned. | 15% |
| 4 | S | Attend construction meetings; make field observations to track construction progress, as necessary; support construction management staff in processing and tracking contractor payment requests; support division staff in tracking and monitoring change orders; document complex construction schedule and cost deviations from baseline; and provide recordkeeping for potential contractor claims. Perform other related construction support duties as assigned. | 15% |



JOB REQUIREMENTS:

| -Description of Minimum Job Requirements- | |
|---|--|
| Formal Education | <p>Work requires broad knowledge in a general professional or technical field. Knowledge is normally acquired through four (4) years of an accredited college or university resulting in a Bachelor's degree or equivalent in Engineering, Business, Construction Management, Business Administration, Public Administration or a closely related field.</p> <p>Additional directly related experience beyond the minimum requirement may substitute for the required education based on the ratio of one and a half (1.5) years of experience for each (1) year of education.</p> |
| Experience | A minimum of three (3) years of experience performing cost and schedule support and associated data analysis for design and construction projects. Experience in transportation or transit projects is preferred. |
| Supervision | Work requires functioning as a lead worker performing essentially the same work as those directed, and includes overseeing work quality, training, instructing, and scheduling work. |
| Human Collaboration Skills | Work may require providing advice to others outside direct reporting relationships on specific problems or general policies. Contacts may require the consideration of different points of view to reach agreement. Elements of persuasion may be necessary to gain cooperation and acceptance of ideas. |
| Freedom to Act | The employee normally performs the job by following established standard operating procedures and/or policies. There is a choice of the appropriate procedure or policy to apply to duties. Performance is reviewed periodically. |
| Technical Skills | Skilled: Work requires a comprehensive, practical knowledge of a technical field with use of analytical judgment and decision-making abilities appropriate to the work environment of the organization. |
| Budget Responsibility | Position has limited fiscal responsibility. May assist in the collection of data in support of recommendations for departmental budget allocations. May monitor division or program/project level budget and expenditures. |
| Reading | Intermediate - Ability to read papers, periodicals, journals, manuals, dictionaries, thesauruses, and encyclopedias. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study. |
| Math | Intermediate - Ability to deal with a system of real numbers; and practical application of fractions, percentages, ratios/proportions and measurement. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study. |
| Writing | Intermediate - Ability to write reports, prepare business letters, expositions, and summaries with proper format, punctuation, spelling, and grammar, using all parts of speech. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from |



| |
|---------------------------------------|
| experience and self-study. |
| Certification & Other Requirements |

| KNOWLEDGE |
|---|
| <ul style="list-style-type: none"> • Intermediate statistical analysis. • Methods and techniques of tracking, recording and presenting statistical data. • English grammar, punctuation, spelling and usage. • Practical application of computers and peripheral equipment. • Problem solving and communication skills. • Principles and practices of contract administration. • Project cost and schedule development best practices. • Funding allocation processes. • Current/local costs for estimating labor, materials and equipment. • Production of database reports. • Processes involved in the completion of environmental studies, design, right of way acquisition, construction and construction management. • Federal contracting requirements and cost accounting standards. • Project management and control principles and systems. • Project metrics to develop cost and resource loaded baseline schedules. • Project scheduling practices and principles. • Standard project reports to monitor schedule progress, expenditures, variances and exceptions. • Project life cycle of conceptualization, planning, execution and termination. • Report and business correspondence writing. |

| SKILLS |
|--|
| <ul style="list-style-type: none"> • Intermediate word processing, spreadsheet, presentation and database software. • Specialized software related to functional area. |

| ABILITIES |
|---|
| <ul style="list-style-type: none"> • Prioritize and deal with conflicting workload requirements. • Learn Enterprise Resource Planning software, DataWarehouse, SAP project system and related modules. • Effectively present information and respond to questions from others. • Learn Federal, State and local agency funding application requirements. • Resolve budget differences between Finance and program control data. • Understand project budget allocation and budget release processes. • Develop project status reports including cost and schedule analysis. • Ensure timely funding and budget transfers. • Work with Division staff to review and update project schedules. • Ensure timely creation of purchase requisitions and purchase orders. |



- Work with Division staff to review and update project cost estimates.
- Develop scope of services for procurement of professional consultant services.
- Manage consultant contracts.
- Ensure that proper codes are used consistently
- Learn District construction practices and reporting requirements.
- Learn District policies, procedures and practices.
- Deal with difficult people and situations.
- Organize information clearly and precisely.
- Communicate clearly and effectively, both orally and in writing, with internal and external contacts.
- Interact professionally with District employees and outside agency representatives.



OVERALL PHYSICAL STRENGTH DEMANDS:

-Physical strength for this position is indicated below with “X”-

| Sedentary | Light | Medium | Heavy | Very Heavy |
|---|--|---|---|--|
| X | | | | |
| Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree. | Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly. | Exerting 50-100 lbs. occasionally, 10-25 lbs. frequently, or up to 10-20 lbs. constantly. | Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly. |

PHYSICAL DEMANDS:

| C | F | O | R | N |
|---|---|---|---|-------------------------------|
| Continuously 2/3 or more of the time. | Frequently From 1/3 to 2/3 of the time. | Occasionally Up to 1/3 of the time. | Rarely Less than 1 hour per week. | Never Never occurs. |

Note: This is intended as a description of the way the job is currently performed. It does not address the potential for accommodation.

| -Physical Demand- | -Frequency- | -Brief Description- |
|---------------------------------|-------------|---|
| Standing | O | Making presentations; observing work site; observing work duties; communicating with co-workers |
| Sitting | C | Desk work; meetings; driving |
| Walking | O | To other departments/offices; around work site |
| Lifting | R | Supplies; files |
| Carrying | R | Supplies; files |
| Pushing/Pulling | R | File drawers; tables and chairs |
| Reaching | R | For supplies; for files |
| Handling | O | Paperwork |
| Fine Dexterity | C | Computer keyboard; telephone keypad; calculator |
| Kneeling | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crouching | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crawling | R | Under equipment |
| Bending | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Twisting | R | From computer to telephone; getting inside vehicle |
| Climbing | R | Stairs |
| Balancing | N | |
| Vision | C | Reading; computer screen; driving; observing work site |
| Hearing | F | Communicating via telephone/radio; to co-workers/public |
| Talking | O | Communicating via telephone/radio; to co-workers/public |
| Foot Controls | R | Driving |
| Other (specified if applicable) | | None |

MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, copier, fax machine, calculator, vehicle, computer and associated hardware and software.



ENVIRONMENTAL FACTORS:

| | | | | |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|
| C Continuously | F Frequently | O Occasionally | R Rarely | N Never |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|

| | | | | |
|-------------------|--|---|------------------------|-------------------|
| D Daily | W Several Times Per Week | M Several Times Per Month | S Seasonally | N Never |
|-------------------|--|---|------------------------|-------------------|

| -Health and Safety Factors- | |
|-----------------------------|---|
| Mechanical Hazards | N |
| Chemical Hazards | N |
| Electrical Hazards | N |
| Fire Hazards | N |
| Explosives | N |
| Communicable Diseases | N |
| Physical Danger or Abuse | N |
| Other (see 1 below) | N |

| -Environmental Factors- | |
|-------------------------|---|
| Respiratory Hazards | N |
| Extreme Temperatures | N |
| Noise and Vibration | N |
| Wetness/Humidity | N |
| Physical Hazards | N |

(1) N/A

PROTECTIVE EQUIPMENT REQUIRED:

Safety shoes, protective eyewear, safety vest, hard hat only if performing occasional field observations.

NON-PHYSICAL DEMANDS:

| | | | |
|---|---|---|-----------------------------------|
| F Frequently From 1/3 to 2/3 of the time | O Occasionally Up to 1/3 of the time | R Rarely Less than 1 hour per week | N Never Never occurs |
|---|---|---|-----------------------------------|

| -Description of Non-Physical Demands- | -Frequency- |
|---|-------------|
| Time Pressure | O |
| Emergency Situation | R |
| Frequent Change of Tasks | F |
| Irregular Work Schedule/Overtime | R |
| Performing Multiple Tasks Simultaneously | F |
| Working Closely with Others as Part of a Team | F |
| Tedious or Exacting Work | O |
| Noisy/Distracting Environment | R |
| Other (see 2 below) | |

(2) N/A

PRIMARY WORK LOCATION:

| | | | |
|--------------------------------|---|---------------------|--|
| Office Environment | X | Vehicle | |
| Warehouse | | Outdoors | |
| Shop | | Other (see 3 below) | |
| Recreation/Neighborhood Center | | | |

(3)N/A

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required. This description is subject to modification as the needs and requirements of the position change.



Title: Risk Administrator

FLSA Status: Exempt

BRIEF DESCRIPTION:

The purpose of this position is to plan, coordinate, supervise and oversee the District’s Risk Management programs as it relates to general liability claims/litigation programs, workers’ compensation claims and the purchase and administration of insurance programs including commercial excess and contract insurance compliance. This is accomplished by coordinating and communicating with management staff, other departments/divisions, external consultants and brokers, acting as an internal consultant to staff and providing guidance and assistance on program issues.

ESSENTIAL FUNCTIONS:

Note: This information is intended to be descriptive of the key responsibilities of the position. The list of essential functions below does not identify all duties performed by any single incumbent in this position. Additionally, please be aware of the legend below when referring to the physical demands of each essential function.

| | | | | |
|---|---|--|---|---|
| (S) Sedentary Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | (L) Light Exerting up to 20 lbs. occasionally; 10 lbs. frequently; or negligible amounts constantly; OR requires walking or standing to a significant degree. | (M) Medium Exerting 20-50 lbs. occasionally; 10-25 lbs. frequently; or up to 10 lbs. constantly. | (H) Heavy Exerting 50-100 lbs. occasionally; 10-25 lbs. frequently; or up to 10-20 lbs. constantly. | (V) Very Heavy Exerting over 100 lbs. occasionally; 50-100 lbs. frequently; or up to 20-50 lbs. constantly. |
|---|---|--|---|---|

| # | Code | Essential Functions | % of Time |
|---|------|---|-----------|
| 1 | S | Administers the District's self administered general liability program and subrogation claims program by planning, assigning, organizing and supervising the staff responsible for claims and loss investigation and processing. Creates or reviews investigative actions plans and identifies possible subrogation opportunities. Calculates reserves and authorizes settlements within established limitations. Develops and implements remedial actions with regard to hazards reported or found during investigations. Prepares and maintains complex records, reports and documentation related to incident/accident/claim investigation. Analyzes data in order to monitor trends in accidents and injuries and recommends remedies to management or other staff. Provides assistance with litigated claims and represents the District in settlement conferences, mediation/arbitrations and trials. Reviews staff recommendations for corrective actions and monitors implementation. | 30% |



| | | | |
|---|---|--|-----|
| 2 | S | <p>Provides oversight of the workers' compensation Third Party Administrator (TPA) which includes ensuring work is performed in accordance with state rules and regulations, Department of Industrial Relations rules and guidelines and within contract terms. Monitors medical cost containment and litigation management. Communicates and coordinates with TPA, Legal, medical service providers, and supervisory and management staff to develop action plans for claim investigation and settlement of work related claims. Maintains a variety of records and reports related to investigation, trending and analysis of accidents and injuries. Develops and implements remedial actions with regard to hazards reported or found during investigations. Prepares and maintains complex records, reports and documentation related to incident/accident/claim investigation. Analyzes data in order to monitor trends in accidents and injuries and recommend remedies to management or other staff. Develops procedures and supervises staff responsible for the light duty/ modified work program. Ensures reporting to various state agencies is completed timely and accurately.</p> | 20% |
| 3 | S | <p>Coordinates with management staff in the development of department annual budget by setting goals, anticipating needs, and monitoring department expenditures. Selects consultants and oversees contracts for variety of risk services. Coordinates with actuary and Finance to provide bi-annual actuarial analysis of claims reserves and to develop and maintain adequate reserves. Coordinates with auditors to provide analysis of self administered general liability and TPA workers' compensation claims management and control. Performs loss analysis and develops systems to effectively manage the district losses. Interpret and apply federal and state laws, Board Policies and District's Administrative Rules and other regulations relative to risk management, safety, loss control, and areas of potential liability. Conduct performance evaluations for staff, set performance goals and objectives and provide training.</p> | 20% |
| 4 | S | <p>Coordinates with assigned staff and broker to oversee the annual design, marketing and selection of all insurance coverage for the District. Reviews and monitors data collection and applications for coverage and meets with providers. Reviews recommendations and analysis developed by staff to identify exposures, contractual and legal obligations and assumption of risk and determines levels of insurance or contract insurance requirements. Administers the Owner Controlled Insurance Program (OCIP), supporting major construction projects, by supervising staff assigned to daily oversight and oversees the contractual performance of insurance services rendered by brokers and consultants. Supervises the audit of insurance premiums and costs. Monitors insurable assets and provides recommendations for safety and security of District assets.</p> | 25% |



| | | | |
|---|---|---|----|
| Represents risk management in safety and claims committee meetings. | | | |
| 5 | S | Develops procedures and supervises staff responsible for District contract insurance program. Reviews analysis of associated risk and appropriate risk transfer on third party contracts, leases, agreements and purchases. Approves affidavits of insurance when required. | 5% |



JOB REQUIREMENTS:

| -Description of Minimum Job Requirements- | |
|---|---|
| Formal Education | <p>Work requires broad knowledge in a general professional or technical field. Knowledge is normally acquired through four (4) years of an accredited college or university resulting in a Bachelor's degree or equivalent in Public Administration, Human Resources Management, Risk Management, or a related field.</p> <p>Additional directly related experience beyond the minimum requirement may substitute for the required education based on the ratio of one and a half (1.5) years of experience for each (1) year of education.</p> |
| Experience | <p>A minimum of five (5) years of experience in risk management with direct experience in worker's compensation, general liability or property damage claims, or loss prevention including two (2) years of experience supervising a claims processing unit.</p> |
| Supervision | <p>Work requires supervising and monitoring performance for a regular group of employees or department including providing input on hiring/disciplinary actions and work objectives/ effectiveness, performance evaluations, and realigning work as needed.</p> |
| Human Collaboration Skills | <p>Recommendations regarding policy development and implementation are made and/or recommended. Evaluates customer satisfaction, develops cooperative associations, and utilizes resources to continuously improve customer satisfaction.</p> |
| Freedom to Act | <p>The employee normally performs the job by following established standard operating procedures and/or policies. There is a choice of the appropriate procedure or policy to apply to duties. Performance reviewed periodically.</p> |
| Technical Skills | <p>Skilled: Work requires a comprehensive, practical knowledge of a technical field with use of analytical judgment and decision-making abilities appropriate to the work environment of the organization.</p> |
| Budget Responsibility | <p>Position has moderate fiscal responsibility. May be responsible for the billing, collection and/or accounting of funds. May be responsible for the handling and balancing of cash.</p> |
| Reading | <p>Advanced - Ability to read literature, books, reviews, scientific or technical journals, abstracts, financial reports, and/or legal documents. Ordinarily, such education is obtained in at the college level or above. However, it may be obtained from experience and self-study.</p> |
| Math | <p>Intermediate - Ability to deal with a system of real numbers; and practical application of fractions, percentages, ratios/proportions and measurement. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study.</p> |
| Writing | <p>Advanced - Ability to write editorials, journals, speeches, manuals, or critiques. Ordinarily, such education is obtained in at the college level or above. However, it may be obtained from experience and self-study.</p> |



| | |
|---------------------------------------|--|
| Certification & Other Requirements | Valid California Class C Drivers' License. |
|---------------------------------------|--|

| KNOWLEDGE |
|--|
| <ul style="list-style-type: none"> • Principles of organization, administration, budget and risk management as it related directly to worker's compensation and general liability. • Principles and practices of public agencies in the administration of workers compensation, risk and general liability. • Principles of California legal system, civil code, judicial practice, mediation, arbitration, trial procedures, deposition procedures, etc. • Principles and practices of government budgeting. • Supervisory practices and procedures. • Reporting requirements to government and other agencies. • Rules, regulations, and laws pertaining to records management. • Personnel principles and practice. • District organizational rules, procedures, programs, plans, and contracts. |

| SKILLS |
|---|
| <ul style="list-style-type: none"> • Advanced word processing, spreadsheet, presentation and database software. • Specialized software related to functional area. • Email, contact management, and scheduling software. |

| ABILITIES |
|---|
| <ul style="list-style-type: none"> • Resolve conflicts and handle complaints over a wide variety of issues including settlement of claims, liability of claims, workers' compensation determinations, etc. • Maintain current on any changes to contracts, rules, procedures, and pertinent laws. • Communicate effectively with employees, staff, complainants, third party administrators, third party contacts such as attorneys, etc. • Coordinate agenda items with other departments, third party administrators, and court dockets. • Gather data from various sources. • Analyze utilization and experience data. • Make decisions on relative cost and benefits to organization. • Deal with complex problems and review related information to evaluate and make recommendations. • Understand current and future liability costs and impact on the district. • Troubleshoot and investigate insurance issues. • Maintain confidentiality of records. • Learn organization's rules as they pertain to special programs. Ensure work is completed in a timely manner. • Learn district and departmental operating polices and procedures. |



- Speak clearly and communicate messages to appropriate individuals.
- Organize information clearly and precisely.
- Ability to develop complex programs, including cost saving strategies, strategies that align with long term strategic plan of the district as well as program alignment with new laws and regulations.
- Plan, organize and assign the work of varied staff of employees.
- Analyze administrative and technical problems and make sound policy and procedural recommendations to their solution.
- Direct the collection, interpretation, and evaluation of data.
- Prepare comprehensive reports of management activities and costs.



OVERALL PHYSICAL STRENGTH DEMANDS:

-Physical strength for this position is indicated below with "X"-

| Sedentary | Light | X | Medium | Heavy | Very Heavy |
|---|--|---|---|---|--|
| Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree. | | Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly. | Exerting 50-100 lbs. occasionally, 10-25 lbs. frequently, or up to 10-20 lbs. constantly. | Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly. |

PHYSICAL DEMANDS:

| C | F | O | R | N |
|--|--|--|--------------------------------------|------------------------|
| Continuously 2/3 or more of the time. | Frequently From 1/3 to 2/3 of the time. | Occasionally Up to 1/3 of the time. | Rarely Less than 1 hour per week. | Never Never occurs. |

Note: This is intended as a description of the way the job is currently performed. It does not address the potential for accommodation.

| -Physical Demand- | -Frequency- | -Brief Description- |
|------------------------------------|-------------|---|
| Standing | O | Observing work site; observing work duties; communicating with co-workers |
| Sitting | C | Desk work; meetings; driving |
| Walking | O | To other departments/offices; around work site |
| Lifting | O | Supplies; equipment; files |
| Carrying | R | Supplies; equipment; files |
| Pushing/Pulling | O | File drawers; equipment |
| Reaching | R | For supplies; for files |
| Handling | C | Paperwork |
| Fine Dexterity | C | Computer keyboard; telephone keypad; calculator |
| Kneeling | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crouching | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crawling | R | Under equipment; inside attics/pipes/ditches |
| Bending | O | Filing in lower drawers; retrieving items from lower shelves/ground |
| Twisting | R | From computer to telephone; getting inside vehicle |
| Climbing | R | Stairs; ladders; step stools; onto equipment |
| Balancing | R | On equipment; on step stools |
| Vision | C | Reading; computer screen; driving; observing work site |
| Hearing | C | Communicating via telephone/radio; to co-workers/public; listening to equipment |
| Talking | C | Communicating via telephone/radio; to co-workers/public |
| Foot Controls | O | Driving |
| Other (specified if applicable) | | |

MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Calculator, printer, vehicle, digital camera, radio, voice recorder, computer and associated hardware and software.



ENVIRONMENTAL FACTORS:

| | | | | |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|
| C Continuously | F Frequently | O Occasionally | R Rarely | N Never |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|

| | | | | |
|-------------------|--|---|------------------------|-------------------|
| D Daily | W Several Times Per Week | M Several Times Per Month | S Seasonally | N Never |
|-------------------|--|---|------------------------|-------------------|

| -Health and Safety Factors- | |
|-----------------------------|---|
| Mechanical Hazards | R |
| Chemical Hazards | R |
| Electrical Hazards | R |
| Fire Hazards | R |
| Explosives | R |
| Communicable Diseases | R |
| Physical Danger or Abuse | R |
| Other (see 1 below) | R |

| -Environmental Factors- | |
|-------------------------|---|
| Respiratory Hazards | S |
| Extreme Temperatures | M |
| Noise and Vibration | N |
| Wetness/Humidity | S |
| Physical Hazards | M |

(1) N/A

PROTECTIVE EQUIPMENT REQUIRED:

Protective clothing, safety shoes, and hard hat.

NON-PHYSICAL DEMANDS:

| | | | |
|---|---|---|-----------------------------------|
| F Frequently From 1/3 to 2/3 of the time | O Occasionally Up to 1/3 of the time | R Rarely Less than 1 hour per week | N Never Never occurs |
|---|---|---|-----------------------------------|

| -Description of Non-Physical Demands- | -Frequency- |
|---|-------------|
| Time Pressure | F |
| Emergency Situation | O |
| Frequent Change of Tasks | F |
| Irregular Work Schedule/Overtime | O |
| Performing Multiple Tasks Simultaneously | F |
| Working Closely with Others as Part of a Team | F |
| Tedious or Exacting Work | F |
| Noisy/Distracting Environment | O |
| Other (see 2 below) | N |

(2) N/A

PRIMARY WORK LOCATION:

| | | | |
|--------------------------------|---|---------------------|---|
| Office Environment | X | Vehicle | X |
| Warehouse | | Outdoors | X |
| Shop | | Other (see 3 below) | |
| Recreation/Neighborhood Center | | | |

(3)N/A

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required. This description is subject to modification as the needs and requirements of the position change.



Title: Risk Analyst I

FLSA Status: Non-Exempt

BRIEF DESCRIPTION:

The purpose of this position is to perform a variety of tasks in the following areas: property recovery and general liability claims, contract insurance requirements, information tracking, reporting and document preparation and video evidence coordination. This is accomplished under direct supervision by reviewing, analyzing, investigating and processing general liability and property damage claims and reviewing and monitoring contractual agreements for insurance requirements. Other duties include preparing reports, documents and correspondence and tracking and trending accident and loss information.

ESSENTIAL FUNCTIONS:

Note: This information is intended to be descriptive of the key responsibilities of the position. The list of essential functions below does not identify all duties performed by any single incumbent in this position. Additionally, please be aware of the legend below when referring to the physical demands of each essential function.

| | | | | |
|---|---|---|---|--|
| (S) Sedentary | (L) Light | (M) Medium | (H) Heavy | (V) Very Heavy |
| Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | Exerting up to 20 lbs. occasionally; 10 lbs. frequently; or negligible amounts constantly; OR requires walking or standing to a significant degree. | Exerting 20-50 lbs. occasionally; 10-25 lbs. frequently; or up to 10 lbs. constantly. | Exerting 50-100 lbs. occasionally; 10-25 lbs. frequently; or up to 10-20 lbs. constantly. | Exerting over 100 lbs. occasionally; 50-100 lbs. frequently; or up to 20-50 lbs. constantly. |

| # | Code | Essential Functions | % of Time |
|---|------|---|-----------|
| 1 | L | Coordinates general liability and property damage claims processing by conducting field investigations and responding as necessary to accidents and incidents. Reviews, analyzes and investigates claims to determine cause and calculate liability or cost of damages. Calculates reserves and recommends settlements within established limitations. Provides information obtained from investigations involving employee injuries to workers' compensation staff and Third Party Administrator. Negotiates settlements with insurance adjusters, claimants and attorneys or refers claims to Legal. Files necessary court documents. May attend small claims court, arbitration hearings and other meetings. | 50 % |



| | | | |
|---|---|---|-----|
| 2 | S | Coordinates the District’s contract insurance program by reviewing insurance documents received for renewed and newly awarded contracts and issues releases when contract is in compliance with the District’s insurance requirements. Monitors contracts to verify insurance certificates are current and notifies the contract manager or appropriate staff of expiration. Resolves vendor issues related to verification of insurance certificates and provides feedback to Procurement and department originating contract. | 20% |
| 3 | S | Compiles, analyzes and summarizes statistical information from a variety of sources in order to create reports, evaluate trends and make recommendations for loss prevention, preventative action and overall reduction of risk to the District. Prepares all documentation and correspondence related to assigned claims, investigations, hazards and incidents. Creates tables and queries as requested to maintain various department databases. Creates templates and forms and troubleshoots department databases as required. | 20% |
| 4 | S | Reviews detailed reports and logs from various sources, analyzes potential risks or claims to the District and determines if video documentation should be collected and reviewed. Updates and maintains logs, prepares summary reports and matches video with other documentation related to reports or individual claims. Monitors trends or hazards in order to investigate further and mitigate future risk or notify appropriate staff for corrective action. | 10% |



JOB REQUIREMENTS:

| -Description of Minimum Job Requirements- | |
|---|---|
| Formal Education | <p>Work requires knowledge of a specific vocational, administrative, or technical nature which may be obtained with a two (2) year associate's degree, diploma or equivalent from an accredited college, technical, business, vocational, or correspondence school in Business Administration, Public Administration, Human Resources Management, Risk Management, or a related field. Appropriate certification may be awarded upon satisfactory completion of advanced study or training.</p> <p>Additional directly related experience beyond the minimum requirement may substitute for the required education based on the ratio of one and a half (1.5) years of experience for each (1) year of education.</p> |
| Experience | A minimum of one (1) year of technical or professional experience in general liability or property damage claims processing or insurance administration and/or analysis. |
| Supervision | Job has no responsibility for the direction or supervision of others. |
| Human Collaboration Skills | Work may require providing advice to others outside direct reporting relationships on specific problems or general policies. Contacts may require the consideration of different points of view to reach agreement. Elements of persuasion may be necessary to gain cooperation and acceptance of ideas. |
| Freedom to Act | The employee normally performs the duty assignment after receiving detailed instructions as to methods, procedures, and desired end results with little room for deviation. The immediate supervisor may, at times, provide close and constant review. |
| Technical Skills | Skilled: Work requires a comprehensive, practical knowledge of a technical field with use of analytical judgment and decision-making abilities appropriate to the work environment of the organization. |
| Budget Responsibility | Position has no budget responsibility. Please refer to Essential Functions section of job description for fiscal responsibilities. Overall budget accountability is maintained at the Department/Division level, or as appropriate. |
| Reading | Intermediate: Ability to read papers, periodicals, journals, manuals, dictionaries, thesauruses and encyclopedias. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study. |
| Math | Intermediate - Ability to deal with a system of real numbers; and practical application of fractions, percentages, ratios/proportions and measurement. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study. |
| Writing | Intermediate - Ability to write reports, prepare business letters, expositions, and summaries with proper format, punctuation, spelling, and grammar, using all parts of speech. Ordinarily, such education is |



| | |
|------------------------------------|--|
| | obtained in high school up to college. However, it may be obtained from experience and self-study. |
| Certification & Other Requirements | Valid California Class C Drivers' License. |

| KNOWLEDGE |
|---|
| <ul style="list-style-type: none"> • Principles and practices of statistical analysis. • Research and analytical techniques applied to Risk Management. • Methods and techniques of tracking, recording, and presenting statistical data. • Practical application of computers and peripheral equipment. • English grammar, punctuation, spelling, and usage. • General methods of tactful public communication. • Principles and techniques of liability and subrogation claims adjustment, including tort law, damages and evidence. • Damage appraisal and repair. • Applicable federal, state and local laws, codes, regulations and legal practices of general liability, property damage and other types of claims. • Medical and Legal Terminology. • Methods and techniques of claim negotiation and administration. • Practices and processes of dispute resolution. • Practices, principles, methods and techniques of tracking, recording and presenting statistical data. • Policies, procedures, guidelines, regulations, compliance and reporting requirements impacted by external sources. • Problem solving, organizational, communication and presentation skills. |

| SKILLS |
|---|
| <ul style="list-style-type: none"> • Intermediate word processing, spreadsheet, presentation and database software. • Specialized software related to functional area. • Email, contact management, and scheduling software. |



ABILITIES

- Prioritize and deal with conflicting workload requirements.
- Read, analyze, and interpret District policies, professional journals, technical publications, and government regulations.
- Write reports, business correspondence, and procedure manuals.
- Deal with difficult people and situations.
- Apply District and departmental operating policies and procedures including contract and bargaining agreements.
- Track district contracts for continued insurance compliance.
- Represent the district in Small Claims actions.
- Speak clearly and communicate messages to appropriate individuals.
- Organize information clearly and precisely.
- Perform video dubbing and still frame editing.
- Perform intermediate mathematical calculations, including ratios and percentages.
- Read, analyze and interpret appropriate laws, rules and regulations.
- Extract statistics and written information from reports and transfer to other documents.
- Perform mathematical calculations such as ratios and percentages.
- Analyze, compare, prioritize and evaluation complex data.
- Apply customer service skills, continuously representing the District in a positive way, handling all internal/external contacts with courtesy, diplomacy, and tact.
- Conduct research, prepare and present advocacy materials in a clear and concise manner both orally and in writing.
- Define problem areas, collect and evaluate data and recommend alternative solutions to complex issues and problems. Formulate recommendations and project consequences of recommendations. Be creative in developing and introducing new ideas, using initiative and good judgment.
- Effectively present information and respond to questions from groups, managers, customers, and the general public.
- Establish and maintain effective working relationships with employees, other agencies and the public.
- Exercise sound judgment and make decisions in a manner consistent with applicable laws, rules and policies.
- Successfully manage multiple projects, priorities and schedules simultaneously.
- Interpret and apply laws, regulations and provisions of contracts, ordinances, negotiated agreements and all other regulations or policies.
- Project consequences and financial costs of proposed actions, and make and supporting recommendations and positions.
- Speak to groups.
- Work under deadlines, urgent situations and emotional/confrontational situations that require instructing, persuading and motivating people.



OVERALL PHYSICAL STRENGTH DEMANDS:

-Physical strength for this position is indicated below with “X”-

| Sedentary | X | Light | Medium | Heavy | Very Heavy |
|---|---|--|---|---|--|
| Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | | Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree. | Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly. | Exerting 50-100 lbs. occasionally, 10-25 lbs. frequently, or up to 10-20 lbs. constantly. | Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly. |

PHYSICAL DEMANDS:

| C | F | O | R | N |
|--|--|--|--------------------------------------|------------------------|
| Continuously 2/3 or more of the time. | Frequently From 1/3 to 2/3 of the time. | Occasionally Up to 1/3 of the time. | Rarely Less than 1 hour per week. | Never Never occurs. |

Note: This is intended as a description of the way the job is currently performed. It does not address the potential for accommodation.

| -Physical Demand- | -Frequency- | -Brief Description- |
|------------------------------------|-------------|---|
| Standing | O | Observing work duties; communicating with co-workers |
| Sitting | C | Desk work; meeting; driving |
| Walking | F | To other departments/offices; around work site |
| Lifting | O | Files |
| Carrying | R | Files |
| Pushing/Pulling | O | File drawers; tables and chairs |
| Reaching | R | For files |
| Handling | F | Paperwork |
| Fine Dexterity | C | Computer keyboard; telephone keypad; calculator |
| Kneeling | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crouching | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crawling | R | Under equipment |
| Bending | O | Filing in lower drawers; retrieving items from lower shelves/ground |
| Twisting | R | From computer to telephone; getting inside vehicle |
| Climbing | R | Stairs; onto equipment |
| Balancing | N | |
| Vision | C | Reading; computer screen; driving; observing work site |
| Hearing | C | Communicating via telephone/radio; to co-workers/public |
| Talking | C | Communicating via telephone/radio; to co-workers/public |
| Foot Controls | R | Driving |
| Other (specified if applicable) | | |

MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, fax machine, scanner, copier, computer, associate hardware and software, field investigation equipment including hard hat, vest, measuring tape, camera, smart phone and tape reorder,



ENVIRONMENTAL FACTORS:

| | | | | |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|
| C Continuously | F Frequently | O Occasionally | R Rarely | N Never |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|

| | | | | |
|-------------------|--|---|------------------------|-------------------|
| D Daily | W Several Times Per Week | M Several Times Per Month | S Seasonally | N Never |
|-------------------|--|---|------------------------|-------------------|

| -Health and Safety Factors- | |
|-----------------------------|---|
| Mechanical Hazards | R |
| Chemical Hazards | R |
| Electrical Hazards | R |
| Fire Hazards | R |
| Explosives | R |
| Communicable Diseases | R |
| Physical Danger or Abuse | R |
| Other (see 1 below) | N |

| -Environmental Factors- | |
|-------------------------|---|
| Respiratory Hazards | S |
| Extreme Temperatures | M |
| Noise and Vibration | N |
| Wetness/Humidity | M |
| Physical Hazards | M |

(1) N/A

PROTECTIVE EQUIPMENT REQUIRED:

Hard hat, protective shoes, reflective vest

NON-PHYSICAL DEMANDS:

| | | | |
|---|---|---|-----------------------------------|
| F Frequently From 1/3 to 2/3 of the time | O Occasionally Up to 1/3 of the time | R Rarely Less than 1 hour per week | N Never Never occurs |
|---|---|---|-----------------------------------|

| -Description of Non-Physical Demands- | -Frequency- |
|---|-------------|
| Time Pressure | F |
| Emergency Situation | O |
| Frequent Change of Tasks | F |
| Irregular Work Schedule/Overtime | N |
| Performing Multiple Tasks Simultaneously | O |
| Working Closely with Others as Part of a Team | F |
| Tedious or Exacting Work | F |
| Noisy/Distracting Environment | O |
| Other (see 2 below) | N |

(2) N/A

PRIMARY WORK LOCATION:

| | | | |
|--------------------------------|---|---------------------|--|
| Office Environment | X | Vehicle | |
| Warehouse | | Outdoors | |
| Shop | | Other (see 3 below) | |
| Recreation/Neighborhood Center | | | |

(3)N/A

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required. This description is subject to modification as the needs and requirements of the position change.



Title: Risk Analyst II

FLSA Status: Non-Exempt

BRIEF DESCRIPTION:

The purpose of this position is to perform a variety of tasks in the following areas: property recovery and general liability claims, contract insurance requirements, information tracking, reporting and document preparation and video evidence coordination. This is accomplished by reviewing, analyzing, investigating and processing general liability and property damage claims, setting insurance requirements and reviewing and monitoring contractual agreements for insurance requirements. Other duties include preparing reports, documents and correspondence and tracking and trending accident and loss information.

ESSENTIAL FUNCTIONS:

Note: This information is intended to be descriptive of the key responsibilities of the position. The list of essential functions below does not identify all duties performed by any single incumbent in this position. Additionally, please be aware of the legend below when referring to the physical demands of each essential function.

| | | | | |
|---|---|--|---|---|
| (S) Sedentary Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | (L) Light Exerting up to 20 lbs. occasionally; 10 lbs. frequently; or negligible amounts constantly; OR requires walking or standing to a significant degree. | (M) Medium Exerting 20-50 lbs. occasionally; 10-25 lbs. frequently; or up to 10 lbs. constantly. | (H) Heavy Exerting 50-100 lbs. occasionally; 10-25 lbs. frequently; or up to 10-20 lbs. constantly. | (V) Very Heavy Exerting over 100 lbs. occasionally; 50-100 lbs. frequently; or up to 20-50 lbs. constantly. |
|---|---|--|---|---|

| # | Code | Essential Functions | % of Time |
|---|------|--|-----------|
| 1 | L | Coordinates general liability and property damage claims processing by conducting field investigations and responding as necessary to accidents and incidents. Reviews, analyzes and investigates claims to determine cause and calculate liability or cost of damages. Calculates reserves and recommends settlements within established limitations. Provides information obtained from investigations involving employee injuries to workers' compensation staff and Third Party Administrator. Negotiates settlements with insurance adjusters, claimants and attorneys or refers claims to Legal. Files necessary court documents. Attends small claims court, arbitration hearings and other meetings. | 50 % |
| 2 | S | Coordinates the District's contract insurance program by reviewing contracts in order to evaluate the individual risk and set the necessary insurance requirements. Reviews insurance documents received and issues releases when contracts are in compliance with requirements. Monitors contracts to verify insurance certificates are current and notifies the contract manager or appropriate staff of expiration. Resolves vendor issues related to verification of insurance certificates and providing feedback to Procurement and department originating contract. | 20 % |



| | | | |
|---|---|---|-----|
| 3 | S | Compiles, analyzes and summarizes statistical information from a variety of sources in order to create reports, evaluate trends and make recommendations for loss prevention, preventative action and overall reduction of risk to the District. Prepares all documentation and correspondence related to assigned claims, investigations, hazards and incidents. Creates tables and queries as requested to maintain various department databases. Creates templates and forms and troubleshoots department databases as required. | 20% |
| 4 | S | Reviews detailed reports and logs from various sources, analyzes potential risks or claims to the District and determines if video documentation should be collected and reviewed. Updates and maintains logs, prepares summary reports and matches video with other documentation related to reports or individual claims. Monitors trends or hazards in order to investigate further and mitigate future risk or notify appropriate staff for corrective action. | 10% |



JOB REQUIREMENTS:

| -Description of Minimum Job Requirements- | |
|---|--|
| Formal Education | <p>Work requires broad knowledge in a general professional or technical field. Knowledge is normally acquired through four (4) years of an accredited college or university resulting in a Bachelor's degree or equivalent in Public Administration, Human Resources Management, Risk Management or related field.</p> <p>Additional directly related experience beyond the minimum requirement may substitute for the required education based on the ratio of one and a half (1.5) years of experience for each (1) year of education.</p> |
| Experience | A minimum of three (3) years of technical or professional experience in general liability or property damage claims processing or contract insurance administration and/or analysis. |
| Supervision | Work requires the occasional direction of helpers, assistants, seasonal employees, interns, or temporary employees. |
| Human Collaboration Skills | Decisions regarding implementation of policies may be made. Contact may involve support of controversial positions or the negotiation of sensitive issues or important presentations. Contacts may involve stressful, negative interactions with the public requiring high levels of tact and the ability to respond to aggressive interpersonal interactions. |
| Freedom to Act | The employee normally performs the duty assignment after receiving general instructions as to methods, procedures, and desired end results. There is some opportunity for discretion when making selections among a few, easily identifiable choices. The assignment is usually reviewed upon completion. |
| Technical Skills | Skilled: Work requires a comprehensive, practical knowledge of a technical field with use of analytical judgment and decision-making abilities appropriate to the work environment of the organization. |
| Budget Responsibility | Position has limited fiscal responsibility. May assist in the collection of data in support of recommendations for departmental budget allocations. May monitor division or program/project level budget and expenditures. |
| Reading | Advanced - Ability to read literature, books, reviews, scientific or technical journals, abstracts, financial reports, and/or legal documents. Ordinarily, such education is obtained in at the college level or above. However, it may be obtained from experience and self-study. |
| Math | Intermediate - Ability to deal with system of real numbers; practical application of fractions, percentages, ratios/proportions and measurement. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study. |
| Writing | Intermediate - Ability to write reports, prepare business letters, expositions, and summaries with proper format, punctuation, spelling, and grammar, using all parts of speech. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from |



| | |
|------------------------------------|--|
| | experience and self-study. |
| Certification & Other Requirements | Valid California Class C Drivers' License. |

KNOWLEDGE

- Principles and practices of statistical analysis.
- Research and analytical techniques applied to Risk Management.
- Methods and techniques of tracking, recording, and presenting statistical data.
- Practical application of computers and peripheral equipment.
- English grammar, punctuation, spelling, and usage.
- General methods of tactful public communication.
- Principles and techniques of liability and subrogation claims adjustment, including tort law, damages and evidence.
- Damage appraisal and repair.
- Applicable federal, state and local laws, codes, regulations and legal practices of general liability, property damage and other types of claims.
- Medical and Legal Terminology.
- Methods and techniques of claim negotiation and administration.
- Practices and processes of dispute resolution.
- Practices, principles, methods and techniques of tracking, recording and presenting statistical data.
- Policies, procedures, guidelines, regulations, compliance and reporting requirements impacted by external sources.
- Problem solving, organizational, communication and presentation skills.

SKILLS

- Intermediate word processing, spreadsheet, presentation and database software.
- Specialized software related to functional area.
- Email, contact management, and scheduling software.

ABILITIES

- Prioritize and deal with conflicting workload requirements.
- Read, analyze, and interpret District policies, professional journals, technical publications, and government regulations.
- Write reports, business correspondence, and procedure manuals.
- Deal with difficult people and situations.
- Apply District and departmental operating policies and procedures including contract and bargaining agreements.
- Track district contracts for continued insurance compliance.



- Represent the district in Small Claims actions.
- Speak clearly and communicate messages to appropriate individuals.
- Organize information clearly and precisely.
- Perform video dubbing and still frame editing.
- Perform intermediate mathematical calculations, including ratios and percentages.
- Read, analyze and interpret appropriate laws, rules and regulations.
- Extract statistics and written information from reports and transfer to other documents.
- Perform mathematical calculations such as ratios and percentages.
- Analyze, compare, prioritize and evaluation complex data.
- Apply customer service skills, continuously representing the District in a positive way, handling all internal/external contacts with courtesy, diplomacy, and tact.
- Conduct research, prepare and present advocacy materials in a clear and concise manner both orally and in writing.
- Define problem areas, collect and evaluate data and recommend alternative solutions to complex issues and problems. Formulate recommendations and project consequences of recommendations. Be creative in developing and introducing new ideas, using initiative and good judgment.
- Effectively present information and respond to questions from groups, managers, customers, and the general public.
- Establish and maintain effective working relationships with employees, other agencies and the public.
- Exercise sound judgment and make decisions in a manner consistent with applicable laws, rules and policies.
- Successfully manage multiple projects, priorities and schedules simultaneously.
- Interpret and apply laws, regulations and provisions of contracts, ordinances, negotiated agreements and all other regulations or policies.
- Project consequences and financial costs of proposed actions, and make supporting recommendations and positions.
- Speak to groups.
- Work under deadlines, urgent situations and emotional/confrontational situations that require instructing, persuading and motivating people.
- Learn District and other departmental operation policies and procedures.
- Learn SAP processes related to department and job.



OVERALL PHYSICAL STRENGTH DEMANDS:

| -Physical strength for this position is indicated below with "X"- | | | | |
|---|--|---|---|--|
| Sedentary X | Light | Medium | Heavy | Very Heavy |
| Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree. | Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly. | Exerting 50-100 lbs. occasionally, 10-25 lbs. frequently, or up to 10-20 lbs. constantly. | Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly. |

PHYSICAL DEMANDS:

| C Continuously <small>2/3 or more of the time.</small> | F Frequently <small>From 1/3 to 2/3 of the time.</small> | O Occasionally <small>Up to 1/3 of the time.</small> | R Rarely <small>Less than 1 hour per week.</small> | N Never <small>Never occurs.</small> |
|--|--|--|--|--|
|--|--|--|--|--|

Note: This is intended as a description of the way the job is currently performed. It does not address the potential for accommodation.

| -Physical Demand- | -Frequency- | -Brief Description- |
|------------------------------------|-------------|---|
| Standing | O | Making presentations, observing work site, observing work duties; communicating with co-workers |
| Sitting | C | Desk work; meeting; driving |
| Walking | F | To other departments/offices; around work site |
| Lifting | O | Files |
| Carrying | O | Files, equipment, supplies |
| Pushing/Pulling | O | File drawers; tables and chairs |
| Reaching | O | For files, for supplies |
| Handling | F | Paperwork |
| Fine Dexterity | C | Computer keyboard; telephone keypad; calculator |
| Kneeling | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crouching | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crawling | R | Under equipment; Inside attics/pipes/ditches |
| Bending | O | Filing in lower drawers; retrieving items from lower shelves/ground |
| Twisting | R | From computer to telephone; getting inside vehicle |
| Climbing | R | Stairs; ladders; step stools; onto equipment |
| Balancing | R | On equipment |
| Vision | C | Reading; computer screen; driving; observing work site |
| Hearing | C | Communicating via telephone/radio; to co-workers/public |
| Talking | C | Communicating via telephone/radio; to co-workers/public |
| Foot Controls | R | Driving |
| Other (specified if applicable) | | |



MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, fax machine, scanner, copier, computer, associate hardware and software, field investigation equipment including hard hat, vest, measuring tape, camera, smart phone and tape reorder.

ENVIRONMENTAL FACTORS:

| | | | | |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|
| C Continuously | F Frequently | O Occasionally | R Rarely | N Never |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|

| | | | | |
|-------------------|--|---|------------------------|-------------------|
| D Daily | W Several Times Per Week | M Several Times Per Month | S Seasonally | N Never |
|-------------------|--|---|------------------------|-------------------|

| -Health and Safety Factors- | |
|-----------------------------|---|
| Mechanical Hazards | R |
| Chemical Hazards | R |
| Electrical Hazards | R |
| Fire Hazards | R |
| Explosives | R |
| Communicable Diseases | R |
| Physical Danger or Abuse | R |
| Other (see 1 below) | R |

| -Environmental Factors- | |
|-------------------------|---|
| Respiratory Hazards | N |
| Extreme Temperatures | M |
| Noise and Vibration | N |
| Wetness/Humidity | M |
| Physical Hazards | M |

(1) N/A

PROTECTIVE EQUIPMENT REQUIRED:

Hard hat, reflective vest and safety glasses

NON-PHYSICAL DEMANDS:

| | | | |
|---|---|---|-----------------------------------|
| F Frequently From 1/3 to 2/3 of the time | O Occasionally Up to 1/3 of the time | R Rarely Less than 1 hour per week | N Never Never occurs |
|---|---|---|-----------------------------------|

| -Description of Non-Physical Demands- | -Frequency- |
|---|-------------|
| Time Pressure | F |
| Emergency Situation | O |
| Frequent Change of Tasks | F |
| Irregular Work Schedule/Overtime | R |
| Performing Multiple Tasks Simultaneously | F |
| Working Closely with Others as Part of a Team | F |
| Tedious or Exacting Work | F |
| Noisy/Distracting Environment | O |
| Other (see 2 below) | N |

(2) N/A



PRIMARY WORK LOCATION:

| | | | |
|--------------------------------|---|---------------------|--|
| Office Environment | X | Vehicle | |
| Warehouse | | Outdoors | |
| Shop | | Other (see 3 below) | |
| Recreation/Neighborhood Center | | | |

(3)N/A

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required. This description is subject to modification as the needs and requirements of the position change.



Title: Senior Engineering Analyst

FLSA Status: Exempt

BRIEF DESCRIPTION:

The purpose of this position is to provide advanced journey level analytical and data reporting support for the District’s capital and maintenance programs, including the most complex project and engineering analysis, through scope, cost and schedule management. This is accomplished by developing project schedules and cash flow, reviewing project cost estimates, developing and updating project status reports, developing project work breakdown structure and allocating funding based upon direction from project manager, coordinating project funding updates and budget transfers with Finance staff, performing complex project analysis, assisting project and contract managers in tracking expenditures against approved budget, preparing issue papers and data reporting. Other duties include providing supervision to subordinate staff and informal direction to administrative staff assisting with projects, coordinating interdepartmental projects, participating in project construction meetings, providing project meeting minutes with follow-up action items, observing project field construction progress, tracking contract payments, change orders, requests for information and submittal status.

ESSENTIAL FUNCTIONS:

Note: This information is intended to be descriptive of the key responsibilities of the position. The list of essential functions below does not identify all duties performed by any single incumbent in this position. Additionally, please be aware of the legend below when referring to the physical demands of each essential function.

| (S) Sedentary | (L) Light | (M) Medium | (H) Heavy | (V) Very Heavy |
|---|---|---|---|--|
| Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | Exerting up to 20 lbs. occasionally; 10 lbs. frequently; or negligible amounts constantly; OR requires walking or standing to a significant degree. | Exerting 20-50 lbs. occasionally; 10-25 lbs. frequently; or up to 10 lbs. constantly. | Exerting 50-100 lbs. occasionally; 10-25 lbs. frequently; or up to 10-20 lbs. constantly. | Exerting over 100 lbs. occasionally; 50-100 lbs. frequently; or up to 20-50 lbs. constantly. |

| # | Code | Essential Functions | % of Time |
|---|------|--|-----------|
| 1 | S | Develop and review complex project schedules, project work breakdown structures and complex project cash flow and management plans; review project cost estimates; manage project budget information and expenditures; review project cost estimates; coordinate project funding updates and budget transfers; develop project and document control procedures, project management plans and reports for capital projects; develop work breakdown structure for projects; establish project cost and schedule baselines; monitor and track status against the baselines; develop scope of services for procurement of professional consultant services; and assist with updating the Capital Improvement Plan. Perform other related scope, cost and schedule management duties as assigned. | 60% |
| 2 | S | Manage consultant contracts; evaluate submitted proposals; attend construction and project meetings; and make field observations to track construction progress, as necessary. Perform other related | 15% |



| | | | |
|---|---|--|-----|
| | | construction support duties as assigned. | |
| 3 | S | Perform complex analysis and reporting on project data; develop, analyze and update complex project reports detailing status, cost, schedule and forecast; assist in the development of department and division budgets; and develop complex spreadsheets and databases to track project information. Perform other related project data analysis and reporting duties as assigned. | 15% |
| 4 | S | Prepare and write complex technical reports, issue papers and Requests for Proposals/Qualifications; attend RT Board meetings as required, supervise subordinate Engineering Analyst I/II staff; write, conduct and administer performance evaluations and associated corrective action/performance requirements; and provide informal direction to administrative staff assisting with projects. Perform other related administrative and supervisory duties as assigned. | 10% |



JOB REQUIREMENTS:

| -Description of Minimum Job Requirements- | |
|---|--|
| Formal Education | <p>Work requires broad knowledge in a general professional or technical field. Knowledge is normally acquired through four (4) years of an accredited college or university resulting in a Bachelor's degree or equivalent in Engineering, Business, Construction Management, Business Administration, Public Administration or a closely related field.</p> <p>Additional directly related experience beyond the minimum requirement may substitute for the required education based on the ratio of one and a half (1.5) years of experience for each (1) year of education.</p> |
| Experience | A minimum of four (4) years of experience performing complex cost and schedule support and associated data analysis for design and construction projects. Experience in transportation or transit projects is preferred. |
| Supervision | Work requires supervising and monitoring performance for a regular group of employees or department including providing input on hiring/disciplinary actions and work objectives/ effectiveness, performance evaluations, and realigning work as needed. A first line supervisor typically performs these functions. |
| Human Collaboration Skills | Decisions regarding implementation of policies may be made. Contact may involve support of controversial positions or the negotiation of sensitive issues or important presentations. Contacts may involve stressful, negative interactions with the public requiring high levels of tact and the ability to respond to aggressive interpersonal interactions. |
| Freedom to Act | The employee normally performs the job by following established standard operating procedures and/or policies. There is a choice of the appropriate procedure or policy to apply to duties. Performance is reviewed periodically. |
| Technical Skills | Skilled: Work requires a comprehensive, practical knowledge of a technical field with use of analytical judgment and decision-making abilities appropriate to the work environment of the organization. |
| Budget Responsibility | Position has moderate fiscal responsibility. May be responsible for the billing, collection and/or accounting of funds. May be responsible for the handling and balancing of cash. |
| Reading | Advanced: Ability to read literature, books, reviews, scientific or technical journals, abstracts, financial reports and/or legal documents. Ordinarily, such education is obtained at the college level or above. However, it may be obtained from experience and self-study. |
| Math | Advanced: Ability to apply fundamental concepts of theories; work with advanced mathematical operations methods and functions of real and complex variables. Ordinarily, such education is obtained at the college level or above. However, it may be obtained from experience and self-study. |
| Writing | Advanced: Ability to write editorials, journals, speeches, manuals, or |



| |
|---|
| critiques. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study. |
| Certification & Other Requirements: |

| |
|------------------|
| KNOWLEDGE |
|------------------|

- | |
|---|
| <ul style="list-style-type: none"> • Advanced statistical analysis. • Methods and techniques of tracking, recording and presenting statistical data. • English grammar, punctuation, spelling and usage. • Principles and practices of contract administration. • Project cost and schedule development best practices. • Funding allocation processes. • Federal, State and local agency funding application requirements. • Current/local costs for estimating labor, materials and equipment. • Processes involved in the completion of environmental studies, design, right of way acquisition, construction and construction management. • Federal contracting requirements and cost accounting standards. • Project management and control principles and systems. • Project metrics to develop cost and resource loaded baseline schedules. • Project scheduling practices and principles. • Standardized project reports to monitor schedule progress, expenditures, variances and exceptions. • Project life cycle of conceptualization, planning, execution, and termination. • Construction practices and reporting requirements. • Project budget allocation and budget release processes. • Project status reporting including cost and schedule analysis. • Write reports and business correspondence. |
|---|

| |
|---------------|
| SKILLS |
|---------------|

- | |
|--|
| <ul style="list-style-type: none"> • Advanced word processing, spreadsheet, presentation and database software. • Specialized software related to functional area. |
|--|

| |
|------------------|
| ABILITIES |
|------------------|

- | |
|--|
| <ul style="list-style-type: none"> • Prioritize and deal with conflicting workload requirements. • Learn Enterprise Resource Planning software, DataWarehouse, SAP project system and related modules. • Effectively present information and respond to questions from groups, managers, customers and the general public. • Resolve budget differences between Finance and program control data. • Ensure timely funding and budget transfers. • Work with Division staff to review and update project schedules. |
|--|



- Ensure timely creation of purchase requisitions and purchase orders.
- Work with Division staff to review and update project cost estimates.
- Manage consultant contracts
- Ensure that proper codes are used consistently
- Learn Division and District business practices and procedures.
- Learn District policies, procedures and practices.
- Deal with difficult people and situations.
- Organize information clearly and precisely.
- Communicate clearly and effectively, both orally and in writing, with internal and external contacts.
- Interact professionally with District employees and outside agency representatives.



OVERALL PHYSICAL STRENGTH DEMANDS:

-Physical strength for this position is indicated below with "X"-

| Sedentary | X | Light | Medium | Heavy | Very Heavy |
|---|---|--|---|---|--|
| Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | | Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree. | Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly. | Exerting 50-100 lbs. occasionally, 10-25 lbs. frequently, or up to 10-20 lbs. constantly. | Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly. |

PHYSICAL DEMANDS:

| C | F | O | R | N |
|--|--|--|--------------------------------------|------------------------|
| Continuously 2/3 or more of the time. | Frequently From 1/3 to 2/3 of the time. | Occasionally Up to 1/3 of the time. | Rarely Less than 1 hour per week. | Never Never occurs. |

Note: This is intended as a description of the way the job is currently performed. It does not address the potential for accommodation.

| -Physical Demand- | -Frequency- | -Brief Description- |
|---------------------------------|-------------|---|
| Standing | O | Making presentations; observing work site; observing work duties; communicating with co-workers |
| Sitting | C | Desk work; meetings; driving |
| Walking | O | To other departments/offices; around work site |
| Lifting | R | Supplies; files |
| Carrying | R | Supplies; files |
| Pushing/Pulling | R | File drawers; tables and chairs |
| Reaching | R | For supplies; for files |
| Handling | O | Paperwork |
| Fine Dexterity | C | Computer keyboard; telephone keypad; calculator |
| Kneeling | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crouching | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crawling | R | Under equipment |
| Bending | R | Filing in lower drawers; retrieving items from lower shelves/ground |
| Twisting | R | From computer to telephone; getting inside vehicle |
| Climbing | R | Stairs |
| Balancing | N | |
| Vision | C | Reading; computer screen; driving; observing work site |
| Hearing | F | Communicating via telephone/radio; to co-workers/public |
| Talking | O | Communicating via telephone/radio; to co-workers/public |
| Foot Controls | R | Driving |
| Other (specified if applicable) | | None |

MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, copier, fax machine, calculator, vehicle, computer and associated hardware and software.



ENVIRONMENTAL FACTORS:

| | | | | |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|
| C Continuously | F Frequently | O Occasionally | R Rarely | N Never |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|

| | | | | |
|-------------------|--|---|------------------------|-------------------|
| D Daily | W Several Times Per Week | M Several Times Per Month | S Seasonally | N Never |
|-------------------|--|---|------------------------|-------------------|

| -Health and Safety Factors- | |
|-----------------------------|---|
| Mechanical Hazards | N |
| Chemical Hazards | N |
| Electrical Hazards | N |
| Fire Hazards | N |
| Explosives | N |
| Communicable Diseases | N |
| Physical Danger or Abuse | N |
| Other (see 1 below) | N |

| -Environmental Factors- | |
|-------------------------|---|
| Respiratory Hazards | N |
| Extreme Temperatures | N |
| Noise and Vibration | N |
| Wetness/Humidity | N |
| Physical Hazards | N |

(1) N/A

PROTECTIVE EQUIPMENT REQUIRED:

Safety shoes, protective eyewear, safety vest, hard hat only if performing occasional field observations.

NON-PHYSICAL DEMANDS:

| | | | |
|---|---|---|-----------------------------------|
| F Frequently From 1/3 to 2/3 of the time | O Occasionally Up to 1/3 of the time | R Rarely Less than 1 hour per week | N Never Never occurs |
|---|---|---|-----------------------------------|

| -Description of Non-Physical Demands- | -Frequency- |
|---|-------------|
| Time Pressure | O |
| Emergency Situation | R |
| Frequent Change of Tasks | F |
| Irregular Work Schedule/Overtime | R |
| Performing Multiple Tasks Simultaneously | F |
| Working Closely with Others as Part of a Team | F |
| Tedious or Exacting Work | O |
| Noisy/Distracting Environment | R |
| Other (see 2 below) | |

(2) N/A

PRIMARY WORK LOCATION:

| | | | |
|--------------------------------|---|---------------------|--|
| Office Environment | X | Vehicle | |
| Warehouse | | Outdoors | |
| Shop | | Other (see 3 below) | |
| Recreation/Neighborhood Center | | | |

(3)N/A

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required. This description is subject to modification as the needs and requirements of the position change.



Title: Senior Risk Analyst

FLSA Status: Exempt

BRIEF DESCRIPTION:

The purpose of this position is to perform complex responsibilities for a variety of risk management services including property recovery and general liability claims and insurance program requirements. Other duties include preparing statutory reports and administering department projects. This position is responsible for directly or indirectly supervising staff, project team members or external vendor staff.

ESSENTIAL FUNCTIONS:

Note: This information is intended to be descriptive of the key responsibilities of the position. The list of essential functions below does not identify all duties performed by any single incumbent in this position. Additionally, please be aware of the legend below when referring to the physical demands of each essential function.

| | | | | |
|---|---|--|---|---|
| (S) Sedentary Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | (L) Light Exerting up to 20 lbs. occasionally; 10 lbs. frequently; or negligible amounts constantly; OR requires walking or standing to a significant degree. | (M) Medium Exerting 20-50 lbs. occasionally; 10-25 lbs. frequently; or up to 10 lbs. constantly. | (H) Heavy Exerting 50-100 lbs. occasionally; 10-25 lbs. frequently; or up to 10-20 lbs. constantly. | (V) Very Heavy Exerting over 100 lbs. occasionally; 50-100 lbs. frequently; or up to 20-50 lbs. constantly. |
|---|---|--|---|---|

| # | Code | Essential Functions | % of Time |
|---|------|---|-----------|
| 1 | L | Resolves complex general liability and property damage claims processing by conducting field investigations and responding as necessary to accidents and incidents. Reviews, analyzes and investigates claims to determine cause and calculate liability or cost of damages. Calculates and monitors reserves. Negotiates settlements, within established limitations, with insurance adjusters, claimants and attorneys or refers claims to Legal. Provides information obtained from investigations involving employee injuries to workers' compensation staff and Third Party Administrator. Conducts confidential investigations required for the proper investigation of employment related claims and to assist the defense of claims or lawsuits against the district. Represents the district in litigated matters including small claims court, depositions, mediation/ arbitration hearings, trials and other meetings. | 45% |
| 2 | S | Oversees the District's insurance program by collecting and compiling data regarding asset values and various exposures. Analyzes exposures and recommends appropriate levels of insurance coverage or loss control measures including risk transfer. Coordinates with broker to complete applications for the acquisition of insurance coverage and participates in marketing, renewal strategies, underwriting analysis and premium quote reviews. Acts as project manager for Owner Controlled Insurance Program (OCIP), supporting major construction projects, and provides daily oversight for contract insurance requirements and overall claims | 30% |



| | | | |
|---|---|---|-----|
| | | management. Monitors contractual performance of services rendered by insurance brokers, consultants and project safety staff and reviews insurance documents for compliance and status. Coordinates with brokers and consultants to review and approve coverage, limits and carriers. | |
| 3 | S | Directly or indirectly supervises staff in Risk, external departments or project teams by planning, prioritizing, assigning, monitoring, and reviewing the work of staff members. Participates in the selection of staff, planning and coordinating training, managing the correction of deficiencies. In the case of direct support staff, prepares, conducts and administers performance evaluations and associated corrective action/performance requirements. | 15% |
| 4 | S | Plans, organizes and administers or manages various special projects or programs. Prepares complex reports, white papers and internal memos related to responsibilities and project tasks. Makes presentations to senior management/Executive Management as it relates to project work. Develops scope of work for RFP's, participates in the evaluation and selection of vendors and contractors and monitor contract budget. Recommends or develops and assists in implementing improved administrative methods and procedures. Provides staff support to committees or other departments as assigned. Provides recommendations for budget projections and assists with budget preparation and administration. Assists in determining financial methods, procedures and costs pertaining to a departmental service or program. Conducts cost benefit analyses and reviews and prepares financial and statistical reports. | 10% |



JOB REQUIREMENTS:

| -Description of Minimum Job Requirements- | |
|---|--|
| Formal Education | <p>Work requires broad knowledge in a general professional or technical field. Knowledge is normally acquired through four (4) years of an accredited college or university resulting in a Bachelor's degree or equivalent in Public Administration, Human Resources Management, Risk Management or related field.</p> <p>Additional directly related experience beyond the minimum requirement may substitute for the required education based on the ratio of one and a half (1.5) years of experience for each (1) year of education.</p> |
| Experience | <p>A minimum of four (4) years of experience in general liability or property damage claims processing or contract insurance administration and/or analysis.</p> |
| Supervision | <p>Work requires supervising and monitoring performance for a regular group of employees or department including providing input on hiring/disciplinary actions and work objectives/ effectiveness, performance evaluations, and realigning work as needed. A first line supervisor typically performs these functions.</p> |
| Human Collaboration Skills | <p>Decisions regarding implementation of policies may be made. Contact may involve support of controversial positions or the negotiation of sensitive issues or important presentations. Contacts may involve stressful, negative interactions with the public requiring high levels of tact and the ability to respond to aggressive interpersonal interactions.</p> |
| Freedom to Act | <p>The employee normally performs the job by following established standard operating procedures and/or policies. There is a choice of the appropriate procedure or policy to apply to duties. Performance reviewed periodically.</p> |
| Technical Skills | <p>Skilled: Work requires a comprehensive, practical knowledge of a technical field with use of analytical judgment and decision-making abilities appropriate to the work environment of the organization.</p> |
| Budget Responsibility | <p>Position has moderate fiscal responsibility. May be responsible for the billing, collection and/or accounting of funds. May be responsible for the handling and balancing of cash.</p> |
| Reading | <p>Advanced - Ability to read literature, books, reviews, scientific or technical journals, abstracts, financial reports, and/or legal documents. Ordinarily, such education is obtained in at the college level or above. However, it may be obtained from experience and self-study.</p> |
| Math | <p>Intermediate - Ability to deal with a system of real numbers; and practical application of fractions, percentages, ratios/proportions and measurement. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study.</p> |
| Writing | <p>Intermediate - Ability to write reports, prepare business letters, expositions, and summaries with proper format, punctuation, spelling, and grammar, using all parts of speech. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and</p> |



| | |
|------------------------------------|--|
| | self-study. |
| Certification & Other Requirements | Valid California Class C Drivers' License. |

KNOWLEDGE

- Principles and practices of statistical analysis.
- Research and analytical techniques applied to Risk Management.
- Methods and techniques of tracking, recording, and presenting statistical data.
- Practical application of computers and peripheral equipment.
- English grammar, punctuation, spelling, and usage.
- General methods of tactful public communication.
- Principles and techniques of liability and subrogation claims adjustment, including tort law, damages and evidence.
- Damage appraisal and repair.
- Applicable federal, state and local laws, codes, regulations and legal practices of general liability, property damage and other types of claims.
- Medical and Legal Terminology.
- Methods and techniques of claim negotiation and administration.
- Practices and processes of dispute resolution.
- Practices, principles, methods and techniques of tracking, recording and presenting statistical data.
- Policies, procedures, guidelines, regulations, compliance and reporting requirements impacted by external sources.
- Problem solving, organizational, communication and presentation skills.
- Principles and methods of supervision, motivation, training, and performance evaluations.

SKILLS

- Advanced word processing, spreadsheet, presentation and database software.
- Specialized software related to functional area.
- Email, contact management, and scheduling software.

ABILITIES

- Prioritize and deal with conflicting workload requirements.
- Read, analyze, and interpret District policies, professional journals, technical publications, and government regulations.
- Write reports, business correspondence, and procedure manuals.
- Deal with difficult people and situations.
- Apply District and departmental operating policies and procedures including contract and bargaining agreements.



- Track district contracts for continued insurance compliance.
- Represent the district in Small Claims actions.
- Speak clearly and communicate messages to appropriate individuals.
- Organize information clearly and precisely. Perform video dubbing and still frame editing.
- Perform intermediate mathematical calculations, including ratios and percentages.
- Read, analyze and interpret appropriate laws, rules and regulations.
- Extract statistics and written information from reports and transfer to other documents.
- Perform mathematical calculations such as ratios and percentages.
- Analyze, compare, prioritize and evaluation complex data.
- Apply customer service skills, continuously representing the District in a positive way, handling all internal/external contacts with courtesy, diplomacy, and tact.
- Conduct research, prepare and present advocacy materials in a clear and concise manner both orally and in writing.
- Define problem areas, collect and evaluate data and recommend alternative solutions to complex issues and problems.
- Formulate recommendations and project consequences of recommendations. Be creative in developing and introducing new ideas, using initiative and good judgment.
- Effectively present information and respond to questions from groups, managers, customers, and the general public.
- Establish and maintain effective working relationships with employees, other agencies and the public.
- Exercise sound judgment and make decisions in a manner consistent with applicable laws, rules and policies.
- Successfully manage multiple projects, priorities and schedules simultaneously.
- Interpret and apply laws, regulations and provisions of contracts, ordinances, negotiated agreements and all other regulations or policies.
- Lead project teams to positive solutions and outcomes.
- Prepare written reports and correspondences, and presentations to senior leadership as required.
- Prioritize and organization multiple activities for self and staff. Read, analyze, and interpret professional journals, technical publications and government regulations.
- Read, analyze, and interpret professional journals, technical publications and government regulations.
- Select, supervise, train, motivate, assign, evaluate, counsel and discipline staff.
- Project consequences and financial costs of proposed actions, and make supporting recommendations and positions.
- Speak to groups.
- Work under deadlines, urgent situations and emotional/confrontational situations that require instructing, persuading and motivating people.
- Learn District and other departmental operation policies and procedures.



- Learn SAP processes related to department and job.
- Train and provide project direction to other members of the Human Resources team, other professionals, technical and paraprofessional staff members.



OVERALL PHYSICAL STRENGTH DEMANDS:

-Physical strength for this position is indicated below with "X"-

| Sedentary | Light | X | Medium | Heavy | Very Heavy |
|---|--|---|---|---|--|
| Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time. | Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree. | | Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly. | Exerting 50-100 lbs. occasionally, 10-25 lbs. frequently, or up to 10-20 lbs. constantly. | Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly. |

PHYSICAL DEMANDS:

| C Continuously 2/3 or more of the time. | F Frequently From 1/3 to 2/3 of the time. | O Occasionally Up to 1/3 of the time. | R Rarely Less than 1 hour per week. | N Never Never occurs. |
|---|---|---|---|-----------------------------|
|---|---|---|---|-----------------------------|

Note: This is intended as a description of the way the job is currently performed. It does not address the potential for accommodation.

| -Physical Demand- | -Frequency- | -Brief Description- |
|---------------------------------|-------------|---|
| Standing | F | Observing work site and duties; communicating with co-workers |
| Sitting | F | Desk work; meetings |
| Walking | F | To other departments/offices; around work site |
| Lifting | R | Supplies |
| Carrying | R | Files |
| Pushing/Pulling | R | Tables and chairs |
| Reaching | F | For files |
| Handling | C | Paperwork |
| Fine Dexterity | C | Computer keyboard; calculator |
| Kneeling | F | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crouching | O | Filing in lower drawers; retrieving items from lower shelves/ground |
| Crawling | N | |
| Bending | F | Filing in lower drawers; retrieving items from lower shelves/grounds |
| Twisting | F | From computer to telephone; getting inside vehicle |
| Climbing | F | Stairs |
| Balancing | N | |
| Vision | C | Reading; computer screen |
| Hearing | F | Communicating via telephone/radio; to co-workers/public; listening to equipment |
| Talking | F | Communicating via telephone/radio; to co-workers/public |
| Foot Controls | O | Driving |
| Other (specified if applicable) | N | None |

MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, fax machine, scanner, copier, computer, associate hardware and software, field investigation equipment including hard hat, vest, measuring tape, camera, smart phone and tape



reorder.

ENVIRONMENTAL FACTORS:

| | | | | |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|
| C Continuously | F Frequently | O Occasionally | R Rarely | N Never |
|--------------------------|------------------------|--------------------------|--------------------|-------------------|

| | | | | |
|-------------------|------------------------------------|-------------------------------------|------------------------|-------------------|
| D Daily | W Several Times Per Week | M Several Times Per Month | S Seasonally | N Never |
|-------------------|------------------------------------|-------------------------------------|------------------------|-------------------|

| -Health and Safety Factors- | |
|-----------------------------|---|
| Mechanical Hazards | N |
| Chemical Hazards | N |
| Electrical Hazards | R |
| Fire Hazards | R |
| Explosives | N |
| Communicable Diseases | N |
| Physical Danger or Abuse | N |
| Other (see 1 below) | N |

| -Environmental Factors- | |
|-------------------------|---|
| Respiratory Hazards | N |
| Extreme Temperatures | N |
| Noise and Vibration | N |
| Wetness/Humidity | N |
| Physical Hazards | N |

(1) N/A

PROTECTIVE EQUIPMENT REQUIRED:

Work boots

NON-PHYSICAL DEMANDS:

| | | | |
|---|---|---|-----------------------------------|
| F Frequently From 1/3 to 2/3 of the time | O Occasionally Up to 1/3 of the time | R Rarely Less than 1 hour per week | N Never Never occurs |
|---|---|---|-----------------------------------|

| -Description of Non-Physical Demands- | -Frequency- |
|---|-------------|
| Time Pressure | O |
| Emergency Situation | F |
| Frequent Change of Tasks | F |
| Irregular Work Schedule/Overtime | O |
| Performing Multiple Tasks Simultaneously | F |
| Working Closely with Others as Part of a Team | F |
| Tedious or Exacting Work | O |
| Noisy/Distracting Environment | O |
| Other (see 2 below) | N |

(2) N/A

PRIMARY WORK LOCATION:

| | | | |
|--------------------------------|---|---------------------|--|
| Office Environment | X | Vehicle | |
| Warehouse | | Outdoors | |
| Shop | | Other (see 3 below) | |
| Recreation/Neighborhood Center | | | |

(3)N/A



The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required. This description is subject to modification as the needs and requirements of the position change.