REGIONAL TRANSIT ISSUE PAPER

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	Agenda	Board Meeting	Open/Closed	Information/Action	Issue
	Item No.	Date	Session	Item	Date
	11	12/14/15	Open	Action	12/04/15

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Subject: Approving Modified Job Descriptions

ISSUE

Whether or not to approve the modified job descriptions.

RECOMMENDED ACTION

Adopt Resolution No. 15-12-____, Approving the Modified Job Descriptions for the Director, Labor Relations, Senior Procurement Analyst, and Purchasing and Materials Administrator.

FISCAL IMPACT

There is no fiscal impact as a result of this action.

DISCUSSION

<u>Personnel Action Summary</u>: This proposed action will result in the modification of 3 existing job descriptions (Director, Labor Relations; Purchasing & Materials Administrator; and Senior Procurement Analyst). There will be no fiscal impact or change to the total number of authorized positions as a results of the proposed action.

Labor Relations

In late September, RT's Director, Labor Relations resigned his position. In response to this resignation, staff reviewed the current job description and determined that updates to the current job description are needed. Staff recommends these changes to the job description to accurately capture the changes in responsibilities of this position since the last incumbent was appointed in 2013.

Staff has made modifications to the job description and essential functions and has determined that the compensable factors for this modified job description have not changed, therefore no change to the salary grade for this position is being recommended. There is no fiscal impact associated with this action because the position is already budgeted and funded within RT's current budget. The modified job description for the Director, Labor Relations is included in Exhibit A.

Procurement

Recently, the Procurement department requested that Human Resources staff review the existing Purchasing and Materials Administrator job description with the intent to clarify essential functions of the position. As a result of that request, staff made changes to the essential functions including the addition of program/project work generally associated with RT's Analyst series and the

Approved:

Presented:

Director, Human Resources J:\Board Meeting Documents\2015\20 December 14, 2015\APIP_12-15.docx

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modification of the percentage of time spent on specific tasks. These changes were necessary to allow the Administrator to perform program/project work if/when the Sr. Analysts are unable to perform such tasks due to workload, complexity or the necessity to have a higher level position at the District perform such work.

Additionally, the knowledge, skills and abilities (KSAs) of the position, which are a list of specialized qualifications and personal attributes needed to perform a particular job, were also modified. Since the primary purpose of KSA's are to measure those qualities that will allow a candidate/incumbent to succeed in the position, it was essential that staff undertake a review and modification of the position's KSA's, ensuring alignment with current and future tasks/expectations.

The Procurement department also requested a review of the existing Senior Procurement Analyst job description. Based on that review and department input, staff modified the essential functions to include the program/project work generally associated with RT's analyst series, as well as a modification of percentages of time spent on specific tasks. These modifications were necessary to allow the Director and Purchasing Administrator to have flexibility when assigning specific programs/programs to incumbents. Additional changes to the job description included the clarification of the KSA's needed to succeed in this position.

Since only minor modifications were proposed to the essential functions and the KSA's of both the Purchasing and Materials Administrator and Senior Procurement Analyst job descriptions, staff determined that the compensable factors for these positions have not changed; therefore, there is no change to the salary grade for either position. The modified Purchasing and Materials Administrator and Senior Procurement Analyst job descriptions are included in Exhibit A. There is no fiscal impact associated with these changes.

Modified Job Descriptions

 Previous Job Title
 Disposition
 New Job Title

 Director, Labor Relations
 Modified
 Director, Labor Relations

 Senior Procurement Analyst
 Modified
 Senior Procurement Analyst

 Purchasing & Materials
 Modified
 Purchasing & Materials

 Administrator
 Administrator
 Administrator

The modified job descriptions are listed below and are attached to the Resolution as Exhibit A.

Staff recommends approval of this action.

RESOLUTION NO. 15-12-____

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

December 14, 2015

APPROVING MODIFIED JOB DESCRIPTIONS FOR DIRECTOR, LABOR RELATIONS, SENIOR PROCUREMENT ANALYST AND PURCHASING AND MATERIALS ADMINISTRATOR

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

THAT, effective December 15, 2015, the modified job descriptions of Director, Labor Relations, Senior Procurement Analyst, and Purchasing and Materials Administrator attached as Exhibit A, are hereby approved and replace the existing job descriptions for said positions.

JAY SCHENIRER, Chair

ATTEST:

MICHAEL R. WILEY, Secretary

By:

Cindy Brooks, Assistant Secretary

EXHIBIT A Modified Job Descriptions Effective December 15, 2015					
Job Description-Previous Title	Job Description-Previous Title Disposition Job Description - New Title				
Director, Labor Relations	Modified	Director, Labor Relations			
Purchasing and Materials Administrator	Modified	Purchasing and Materials Administrator			
Senior Procurement Analyst	Modified	Senior Procurement Analyst			



Title: Director, Labor Relations

FLSA Status: Exempt

BRIEF DESCRIPTION:

Maintaining a primary focus on promoting a healthy labor/management climate, the Director, Labor Relations is responsible for managing, motivating, and directing the District's employee and labor relations programs in the areas of labor contract negotiations and contract administration, drug and alcohol testing, employment law compliance, resolution of employee complaints and grievances, provide advice and counsel to staff on disciplinary actions, and to serve as an advisor to senior management and the Board on labor and management issues in order to maintain efficient employee and labor relations in support of the District's goals and objectives. This position directly reports to the District's Chief Counsel. This position is subject to a background investigation and appointment into the position is contingent on the results of a background check.

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.
3 S Grie • 1 • 1 • 1 • 1 • 1 • 1 • 1 • 1	ential Functions vance Management: Provides guidance negotiates and resolu- ensures that negotia ncorporated into co- appropriate. Oversight of District' lay-to-day administra- within all represente District policies and la Oversee the resolut grievance hearings of appeals, reviewing se lisciplinary policies relations principles, arbitration for final re- grievance administration ctions, and oversee settlements for compli	ves sensitive and ated settlements a ollective bargainin 's grievance proce ation of disciplina d groups to ens abor agreements. ion of grievances or act as hearing settlement terms and consistency preparing and/or solution, training su tion and the prince eng the impleme	controversial iss are documented g agreements where ess by monitoring ary actions/grievan oure compliance we s and may conso officer in grieva for compliance we with general la presenting issues apervisors on effec- ciples of disciplin ntation of grieva	ues; and here the nces with duct unce with abor a in tive hary



		 May work with and make arrangements for appropriate managerial representation; assist management in preparation for hearings. Must communicate courteously and proactively, learn client's short-term and long-term needs, and must have the ability to see issues from the client's perspective. 	
2	S	Contract Administration:	20%
		 Works collaboratively with District managers on employee relations matters to enhance organizational effectiveness and employee experience. Interprets CBAs, MOUs and other union-management agreements and advises managers and supervisors on a course of action. 	
		• Consults with all levels of employees and union representatives to identify and resolve union and employee concerns and issues in an effective, orderly and timely manner.	
		• Develops and implements effective counseling of supervisors in the uniform application of disciplinary procedures and measures of agreement between District and Unions.	
		• Administers labor contracts by providing direction to District staff on the proper interpretation of the provisions of the District's various labor agreements, monitoring trends in union activity related to specific provisions to determine the need to amend the language, providing training to supervision on contract terms following renegotiation of an agreement.	
		• Review union activity for compliance with the terms of their agreement, initiating or directing remedial action for noncompliance with the agreement, and reviewing the actions of all departments for consistent application of the provisions of the applicable agreement.	
5	S	Department Management:	20%
		• Manages the development and implementation of goals, objectives policies and priorities for all assigned programs.	
		• Remains current on new trends, developments, court cases and legislation in the labor relations field at both the state and federal levels, with particular expertise and emphasis on public sector/transit labor relations matters. Monitors legislative activity that impacts assigned functional units and formulates recommendations.	
		• Manages the Labor Relations staff by distributing work assignments to , monitoring progress and ensuring proper completion with CBA/MOU timelines and/or assignment deadlines.	



		• Review and approve staff requests for time off for compliance with District policies and procedures, reviewing bi-monthly departmental payroll for submission to the Finance Department for payment.	
		 Prepare annual departmental budget and monitoring monthly expenditures. 	
		 Completing annual staff performance evaluations in a timely manner. 	
		• Monitor compliance with District safety rules, and reviewing	
		and approving opportunities for staff training and development.Directs the administration of the District's Safety and Service	
4	C	award program.	100/
4	S	Drug and Alcohol Program Management:	10%
		• Directs all activities related to the drug and alcohol program. Subordinate employees under the Director's supervision are responsible for their respective functional units for all activities of the assigned program areas.	
		• Oversees the management of the drug and alcohol testing program by overseeing the administration of the Federal Drug and Alcohol Testing Regulations for safety sensitive employees, monitoring random selection procedures for regulatory compliance.	
		• Attending the annual training for latest developments and procedural changes to the regulations, meeting with employees voluntarily seeking treatment in the District's paid substance abuse treatment program, meeting with employees testing positive for a prohibited substances or misuse of alcohol and transitioning them into rehabilitation, overseeing requests for proposals for selection of service providers, monitoring the administration of disciplinary actions, approving staff training on relevant aspects of the programs for which they are responsible, and monitoring subcontractor performance for compliance with regulations.	
1	S	Chief Contract Strategist:	15 %
		• Serve as District's chief strategist and negotiator team for all	
		collective bargaining negotiations and interim agreements.	
		Sets an example for the overall Labor/Management climate and	
		serves as a critical role to ensure that the labor strategy is	
		aligned with the overall District goals and objectives.	
		Participates in all components of the collective bargaining	
		process.	
		• Formulates labor strategy. Assures that labor contracts meet	
		District goals and objectives and re implemented consistently and fairly. Advises CM and Poard on progress of propriations	
		and fairly. Advises GM and Board on progress of negotiations.	



	 Designs and leads negotiation strategy; providers leadership and consultation to management stakeholders and members of the bargaining team . Develops proposals and counter proposals for negotiation to maintain RT's competitive position in the labor market. Works closely with Finance Department to determine the financial impact of union and management proposals. Conducts or manages the analysis of comparability surveys relative to matters of benefits/compensation, wages, hours and management 	
	 working conditions. Works with management to ensure accurate rollout of all newly bargained provisions of any settlement or CBA. Documents changes and monitors implementation of wage increases, benefit changes and other provisions. 	•
	 Plans, directs, and manages the design, implementation, communication, and administration of long range labor and represented employee relations strategies designed to preserve management rights and enhance employee commitment, motivation, and productivity. 	•
	• Designs, recommends, implements, and manages the District's	•
	 strategies for interactions with union officers. Communicates District's official position with union leaders. Works with Operations executives to ensure coordinated messaging and appropriate discussion with union officers. 	•
	• Designs, coordinates, and assists with the implementation of Districts represented employee relations strategies. Makes recommendations to executives on dealing with labor and employee related issues occurring in the business units. Advises executives and managers on approach for employee discussions and communication in coordination with the labor strategy and union communications.	•
	 Establishes and maintains organizational plans and programs designed to maintain productive relations between management and represented employees, and union officials. 	•
	 Mediation/Arbitration/Fact-finding/Judicial and Other Legal Matters: Represent the District in all matters related to the legal interpretation of contracts. Coordinates with and assists labor counsel in the procreation and defense of all matters. May prepare briefs for arbitration as well as select arbitrators, gather evidence, prepare and/or testify as a witness. Responsible for the implementation of decisions and judgements. 	•
15%	Ongoing Compliance:	
	• Directs and oversees administration of District's collective	•

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•	 bargaining agreement for all represented employees. Oversees strategic & operational efforts to achieve & maintain effective labor/employee relations. Counsels executives and managers regarding the interpretation and application of the collective bargaining agreement as well as the intent, application, and compliance requirements of labor and regulatory laws. Provide strategic advice and counsel, as well as tactical guidance, to internal stakeholders in support of business priorities. Supervises and monitors the administration and application of CBA requirements. Directs the processing, strategy, and potential settlement of all grievances and discipline reviews. Acts as management
•	CBA requirements.
•	Leads performance improvement efforts to improve labor processes in the operational areas, ensuring compliance with all CBA requirements while improving efficiencies and effectiveness.

JOB REQUIREMENTS:

-Description of Minimum Job Requirements-					
Formal Education	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 Business Administration, Public Administration, Human Resource Management, Labor Relations, Organizational Development, Psychology, Sociology, Industrial Relations, Labor Economics, or a related field.				
	Possession of a Juris Doctorate degree is preferred, but not required. The District will pay an incumbent's annual bar dues and MCLE courses for any incumbent with an active California bar license.				
	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.				
Experience	A minimum of seven (7) years of experience in grievance handling, preparation and presentation of arbitration and at-the-table bargaining, including two (2) years of experience serving as the chief spokesperson and a minimum of two (2) years of experience supervising and directing				



	staff in the performance of the employee and labor relations functions. First chair, chief negotiator experience preferred. Experience with a public transportation agency a plus, but not required.
Supervision	Work involves problem solving and mediating highly conflicting, unexpected and unusual problems involving multiple groups. Applies broad management responsibility for a large program or set of related functions. Provides direct and indirect supervision to lower level personnel
Human	Recommendations regarding policy development and implementation are
Collaboration Skills	made and/or recommended. Evaluates customer satisfaction, develops cooperative associations, and utilizes resources to continuously improve customer satisfaction.
Freedom to Act	The employee normally performs the duty assignment according to his or her own judgment, requesting supervisory assistance only when necessary. Special projects are managed with little oversight and assignments may be reviewed upon completion. Performance reviewed periodically.
Technical Skills	Advanced: Work requires advanced skills and knowledge in approaches and systems, which affect the design and implementation of major programs and/or processes organization-wide. Independent judgment and decision-making abilities are necessary to apply technical skills effectively.
Budget Responsibility	Position has major fiscal responsibility. Is responsible for department- wide financial decisions. Assures that appropriate linkages exist between budget requests and departmental goals and objectives. Monitors budget plan, and adjusts as necessary.
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	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 in 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 at the college level or above. However, it may be obtained from experience and self-study.
Certification &	Membership in good standing with the California State Bar, preferred but
Other Requirements	not required. Attorney applicants can have no record of discipline by a State Bar Association.



KNOWLEDGE

- Public sector employee relations typical provisions of collective bargaining agreements and public employee labor laws.
- Procedures for grievance and arbitration proceedings.
- Principles and practices of public sector collective bargaining.
- Principles and practices of administering a comprehensive substance abuse program.
- Principles and practices of budget planning, preparation, administration and control.
- Principles and practices of collaborative problem solving.
- Current labor relations practices, trends and major problems in the public sector.
- Labor contract, construction, and principles of language interpretation.
- Specific laws and regulations impacting employee and labor relations.
- Negotiation strategies and table tactics.
- Impasse resolution procedures and options such as mediation and interest.
- Costing out provisions of the labor agreement to determine the overall cost of the agreement.
- Principles of corrective disciplinary action.
- Arbitration precedent on sustaining discipline on specific acts of misconduct.
- Principles of just cause for sustaining discipline in specific situations of misconduct.
- Effective techniques of supervision and performance evaluation.
- Principled or interest-based process of decision making and conflict.
- General knowledge of Federal and California leave law (e.g. FMLA, ADA, California Family Rights Act, etc.)

SKILLS

- Advanced word processing, spreadsheet and database software
- Specialized software related to functional area

ABILITIES

- Learn and incorporate disciplinary history of the District on specific actions of misconduct.
- Learn and administer provisions of the collective bargaining agreement, rules, and policies guiding conduct of employees.
- Learn and incorporate interests of the union on specific rules or disciplinary principles.
- Learn and incorporate interrelationships of provisions or proposed actions on other operating departments or work units.
- Learn job classifications for making a determination as to whether or not they are



safety sensitive.

- Determine and work with competing interests among staff over the goals and objectives of negotiations.
- Understand political influences on the negotiation process.
- Construct language for precise and clear understanding by all readers.
- Find an agreed upon resolution to issues within the economic and operating parameters established for negotiations.
- Achieve consistent administration of complex language changes.
- Identify practices and contract provisions impacting or giving direction on consistent handling of discipline.
- Investigate and determine objective facts that will sustain or modify proposed actions.
- Mediate resolution to difficult issues between labor and management.
- Maintain consistent administration of actions of a similar nature
- Maintain retrievable records of disciplinary actions for future use.
- Know and understand all the rules and procedures of the District that might impact on a particular situation.
- Understand the underlying operational problems that give rise to a question.
- Know and understand the laws and policies that must be applied to resolve a particular question.
- Keep abreast of changes to the regulations in order to maintain compliance.
- Review staff decisions to conduct post accident or reasonable suspicion testing to be sure they are within compliance requirements.
- Monitor service provider contracts to be sure they are in compliance with the regulations.
- Review and adjust random selection timing to maintain compliance with regulations.
- Adjust policies and procedures for administering disciplinary actions consistent with union agreements.
- Effectively present a budget within the constraints of limited finances that accomplishes the departmental goals.
- Supervise a workforce in a way that keeps the team together and working productively.
- Determine an effective course of staff training and development with limited resources.
- Keep abreast of changing rules and procedures that impact managing a department.
- Search out individuals within the District to effectively respond to departmental operating questions.
- Work effectively under stressful situations involving confrontation and conflict.
- Work effectively with labor unions.
- Establishing and maintaining effective working relationships with those contacted in the course of work.
- Build trust with other staff that may have competing interests in resolving complex



labor issues.

- Overcome the undermining effects of the decisions of others that impact the stability of labor-management relations.
- Keep up-to-date on the current state of the applicable laws and regulations.
- Effectively train staff so that they are aware of changes that will impact their decisions.
- Effectively negotiate complex bargaining agreements.
- Communicate clearly and effectively, both orally and in writing.
- Ability to be perceived as fair, tolerant, honest, and consistent in application of policies and procedures.



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:

С	F	0	R	N			
Continuously	Frequently	Occasionally	Rarely	Never			
2/3 or more of the time.	he time. From 1/3 to 2/3 of the time. Up to 1/3 of the time. Less than 1 hour per week.		Never occurs.				
Note: This is intended	Note: This is intended as a description of the way the job is currently performed. It does not address the potential						

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	Making presentations; communicating with co-workers
Sitting	С	Desk work; meetings; driving
Walking	F	To other departments/offices; around work site
Lifting	0	Supplies; files
Carrying	0	Supplies; files
Pushing/Pulling	0	File drawers; tables and chairs
Reaching	0	For supplies; for files
Handling	С	Paperwork
Fine Dexterity	F	Computer keyboard; telephone keypad; calculator
Kneeling	0	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	F	From computer to telephone; getting inside vehicle
Climbing	0	Stairs
Balancing	N	
Vision	C	Reading; computer screen; driving; observing work site
Hearing	C	Communicating via telephone/radio; to co-workers/public
Talking	F	Communicating via telephone/radio; to co-workers/public
Foot Controls	0	Driving
Other		None noted.
(specified if applicable)		

MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

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



ENVIRONMENTAL FACTORS:

C	F	Occasionally	R	N
Continuously	Frequently		Rarely	Never

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

D	W	Μ	S	Ν		
Daily	Several	Several	Seasonally	Never		
	Times Per	Times Per				
	Week	Month				
-Environmental Factors-						
Respiratory Hazards						
Extreme Temperatures N						
Noise and Vibration						
Wetness/Humidity						
Physical H	Physical Hazards					

PROTECTIVE EQUIPMENT REQUIRED:

NON-PHYSICAL DEMANDS:

F	0	R	Ν
Frequently	Occasionally	Rarely	Never
From $1/3$ to $2/3$ of the time	Up to 1/3 of the time	Less than 1 hour per week	Never occurs
-Dese	-Frequency-		
Time Pressure			F
Emergency Situation	R		
Frequent Change of Tasks	0		
Irregular Work Schedule/	0		
Performing Multiple Task	0		
Working Closely with Oth	F		
Tedious or Exacting Worl	0		
Noisy/Distracting Enviror	R		
Other (see 2 below)			N/A
(2) NI/A			· · ·

(2) N/A

PRIMARY WORK LOCATION:

Office Environment	Х	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 Procurement Analyst

FLSA Status: Exempt

BRIEF DESCRIPTION:

The purpose of this position is to provide complex procurement analysis and support for the District. This is accomplished by developing solicitation packages for procuring materials/supplies, professional, architectural and engineering services, public works, construction and commodities, analyzing proposals and determining contract strategies, soliciting and scheduling funding and authorizations, evaluating bid and proposals for technical compliance, developing and monitoring project management timelines and spreadsheets, coordinating contract specifications such as complying with insurance requirements, determining prevailing wage for the projects, and approving payroll documents. This position may procure materials/supplies, as needed, and is responsible for handling the most complex procurements, problem solving and mediating of highly conflicting or unexpected problems involving multiple groups. Other duties may include supervising subordinate staff, and coordinating interdepartmental projects.

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.

	erting up to 1	Sedentary(L)Lightrting up to 10 lbs.Exerting up to 20 lbs.			Exerting 20-50 lbs. Exerting 50-100 lbs.			(V) Very Heavy Exerting over 100 lbs.		
weigh	sionally or ne nts frequently nost of the ti	; sitting	frequ amou require	asionally; 10 lbs. ently; or negligible ints constantly; OR s walking or standing significant degree.	D lbs. occasionally; 10-25 lbs. occasionally; 10-25 lbs. ligible frequently; or up to 10 lbs. frequently; or up to 10-20 ly; OR constantly. lbs. constantly.		occasionally; 50-100 lbs. frequently; or up to 20-50 lbs. constantly.			
#	Code	Esse	ntial I	Functions						% of Time
1	S	coord of co verify evalu docu goals pre-q verify	linatin ontract ying ating ments for t jualific ying	oroject managed org multiple pro- s, ensuring ve- contractor's de- and approving , coordinating he project and cation package funding and completion no	jects i ndor c icense g prev with l prep es, par trackin	in various sta compliance w es, resolving vailing wages District stat paring a proje ticipating in ng payments	ges, facili ith contra back v and cert if to dete cot agenda contract , and pr	itating av ct insura vage iss ified pay ermine I a, evalua negotiati	vard nce, ues, vroll DBE ting ons,	35%
2	S	deter and solic: cond const oral	minin profestitation ucing tructio presen	ocurements by g procurement ssional servic process, c pre-proposal n conferences ntations, prepa	strate es, co leterm meetin , con ring o	gy for project onducting so ining suffict ngs, public b ducting cont correspondent	ts includi licitations ient pro id openin ract nego ce, and a	ng propo s, manag oject sco ngs, and otiations	sals ging ope, pre and	35%



3	S	Plans, organizes and administers various projects or programs. Prepares complex reports, white papers and internal memos related to 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. Coordinates contract arrangements with other organizations and private parties.	20%
4	S	Tracks and reports information by maintaining various hard file and electronic documents, training end users on applications and troubleshooting questions and problems, assisting with database modifications, developing and recommending alternative solutions for improvement and efficiency.	10%

JOB REQUIREMENTS:

	-Description of Minimum Job Requirements-					
Formal Education	Work requires broad knowledge in a general professional or technica field. Knowledge is normally acquired through four (4) years of a accredited college or university resulting in a Bachelor's degree of equivalent in Business or a related field.					
	Additional directly related experience 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 required education.					
Experience	A minimum of three (3) years of experience performing procurement related activities.					
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	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 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	Position has moderate fiscal responsibility. May be responsible for the
Responsibility	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 in 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 in 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 at the college level or
	above. However, it may be obtained from experience and self-study.
Certification &	· · · ·
Other Requirements	

KNOWLEDGE

- Federal Transit Administration third party contract language clauses and Buy America requirements;
- Applicable Public Contract Codes; Federal, State, and local laws, rules, and regulations pertaining to contracts and procurement, DBE programs, and prevailing wage law.
- State and local laws and regulations governing the expenditure of public funds
- Best principles, practices and procedures for preparing technical specifications and bid documents
- Market conditions and practices, current pricing and product availability;
- Principles and procedures of budget preparation and forecasting.
- Principles and practices of supervision, training and management.
- Product lead times and bid cycle times
- Federal, State and local policies and regulations related to surplus disposal.
- Intermediate statistical analysis.
- Methods and techniques of tracking, recording, and presenting statistical data.
- English grammar, punctuation, spelling, and usage.
- General methods of tactful public communication.
- Procurement and bidding practices.
- Principles and practices of contract administration.
- Principles of government funding processes, data collection and analysis.
- Contract administration processes and funding agreements.



SKILLS

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

ABILITIES

- Deal with bidder/proposer challenging technical specifications and requesting authorization to supply substitutes for the item specified by the District.
- Coordinate surplus property disposal with various departments responsible for retiring equipment.
- Interpret requisitions, drawings and draft specifications.
- Supervise, provide leadership, monitor and resolve conflicts.
- Prioritize and deal with conflicting workload requirements.
- Handle all internal and external contacts with courtesy, diplomacy, and tact.
- Read, analyze, and interpret District policies, professional journals, technical publications, and government regulations.
- Write reports, business correspondence, and procedure manuals.
- Effectively present information and respond to questions from groups, managers, customers, and the general public.
- Deal with difficult people and situations.
- Learn District and departmental operating policies and procedures.
- Learn departmental processes, procedures, tasks, systems and methods.
- Speak clearly and communicate messages to appropriate individuals.
- Organize information clearly and precisely.
- Apply customer service skills, representing the District in a positive way while working with the public.
- Extract and analyze statistics and written information from reports.
- Conduct meetings and public hearings.
- Learn transit agency operations and processes.



OVERALL PHYSICAL STRENGTH DEMANDS:

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

С	F	0	R	Ν
Continuously	Frequently	Occasionally	Rarely	Never
2/3 or more of the time.	From $1/3$ to $2/3$ of the time.	Up to 1/3 of the time.	Less than 1 hour per week.	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	0	Making presentations; observing work site; observing work	
_		duties; communicating with co-workers	
Sitting	С	Desk work; meetings; driving	
Walking	F	To other departments/offices; around work site	
Lifting	F	Supplies; files	
Carrying	F	Supplies; files	
Pushing/Pulling	0	File drawers; tables and chairs	
Reaching	F	For supplies; for files	
Handling	С	Paperwork	
Fine Dexterity	С	Computer keyboard; telephone keypad; calculator	
Kneeling	0	Filing in lower drawers; retrieving items from lower	
		shelves/ground	
Crouching	F	Filing in lower drawers; retrieving items from lower	
		shelves/ground	
Crawling	R	Under equipment	
Bending	F	Filing in lower drawers; retrieving items from lower	
		shelves/ground	
Twisting	C	From computer to telephone; getting inside vehicle	
Climbing	F	Stairs	
Balancing	R	On ladders; on step stools	
Vision	C	Reading; computer screen; driving; observing work site	
Hearing	С	Communicating via telephone/radio; to co-workers/public	
Talking	С	Communicating via telephone/radio; to co-workers/public	
Foot Controls	0	Driving	
Other		None	
(specified if applicable)			

MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, fax machine, calculator, copier, typewriter, paper cutter, postage machine, postage meter, vehicle, computer and associated hardware and software.



ENVIRONMENTAL FACTORS:

CFORNContinuouslyFrequentlyOccasionallyRarelyNeve

-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)	Ν		
(1) N/A			

D	W	М	S	Ν	
Daily	Several	Several	Seasonally	Never	
	Times Per	Times Per			
	Week	Month			
-Environmental Factors-					
Respiratory Hazards					
Extreme Temperatures					
Noise and Vibration					
Wetness/Humidity					
Physical Hazards					

PROTECTIVE EQUIPMENT REQUIRED: None

NON-PHYSICAL DEMANDS:

F	0	R	Ν		
Frequently	Occasionally	ccasionally Rarely			
From 1/3 to 2/3 of the time	Up to 1/3 of the time	Less than 1 hour per week	Never occurs		
-Deso	-Frequency-				
Time Pressure			F		
Emergency Situation	R				
Frequent Change of Tasks	F				
Irregular Work Schedule/	0				
Performing Multiple Task	F				
Working Closely with Oth	F				
Tedious or Exacting Worl	F				
Noisy/Distracting Enviror	О				
Other (see 2 below)	N/A				
(2) N/A					

PRIMARY WORK LOCATION:

Office Environment	X	Vehicle	
Warehouse		Outdoors	
Shop		Other (see 3 below)	
Recreation/Neighborhood Center			
(2)NI/A	*		

(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: Purchasing and Materials Administrator

FLSA Status: Exempt

BRIEF DESCRIPTION:

The purpose of this position is to administer the District's supply management/commodities functions and activities by providing purchasing and material administration for the direct and indirect commodities and associated services. This is accomplished by planning, managing and coordinating daily activities of staff involved in purchasing material, products, supplies and services, warehouse receiving, mail courier service, mail lobby reception and the management and administration of the District's various procurement programs. Other duties include participating in the District's Small Business/DBE outreach events, District-wide procurement training, oversight of various Business Support functions and activities.

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

Code **Essential Functions** % of Time Administration: L Procurement Determines appropriate 25% 1 procurement methods by analyzing, reviewing and assigning requisitions for goods and services, , applying federal, state and District policies and regulations. Working with client groups to verify order requirements, and ensuring small businesses and Disadvantaged Business Enterprises receive equal opportunity. Review and edit technical specifications to verify the specifications are accurately describe the item/services to be purchased and ensuring the description promotes free and open Review and analyze procurement procedures, competition. policies, and systems and recommend improvements; represent the Department at procurement planning meetings to coordinate purchasing functions and timelines with other District departments or outside agencies; coordinate the timing, preparation, processing, receipt and award of contracts with staff and Legal Department. Provides strategic procurement commodity planning by coordinating purchasing functions in support of major projects, analyzing current district commodities for compliance with regulations, maximum cost savings and efficiency, maximizing use of the supplier/vendor base, analyzing contracts for

terminations and future planning, coordinating the award of



		contracts, and conducting community outreach. Act on behalf of the Director, Procurement and/or Manager, Contracts and DBE during absences. Assist in budget preparation and the day to day monitoring of expenditures of various departmental budget line items.	
2		Procurement Activities: Analyze requisitions and, in accordance with local, State and Federal laws, determine appropriate procurement method or contract type for the goods or services requested; prepare complex bid specifications and conduct either negotiations or sealed bid procurement process. Conduct public bid openings for procurements; perform purchasing related research, analyze data, and compile reports; investigate and evaluate alternate sources of supply that have a potential to reduce operating costs; review and edit bid documents prepared by staff to verify that the bid package contains the necessary contract clauses to meet the requirements of Federal, State, and local regulations governing public purchasing.	20%
3	S	Department Administration: Approves invoices and credits for accounts payable, identifies vendors of materials, equipment and supplies, conducts vendor site visits, evaluates product availability, terms of sale, quality and delivery performance, processes all vendor inquiries, reviews, approves and creates purchase orders/requisitions as needed, conducts purchasing audits, negotiates settlements of claims and price changes for damaged or disputed shipments, organizes, coordinates and conducts the sale and/or disposal of surplus property, maintains records, creates correspondence on behalf of the District, attends monthly staff meetings, provides information to other procurements supervisors as requested.	20%
4	S	Supervisory Responsibilities: Provides supervision to a variety of positions, including oversight of the daily activities of procurement and business services staff. Approves schedules, reviews workloads and quality/quantity of work, assessing needs of departmental staff.	20%
7	S	Projects/Programs: Plans, organizes and administers or manages various special projects or programs. Prepares complex reports, white papers and internal memos related to 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	15%



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. Coordinates contract arrangements with other organizations and private parties.



JOB REQUIREMENTS:

	-Description of Minimum Job Requirements-
Formal Education	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 Business Administration, Public Administration or a related field.
	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.
Experience	A minimum of five (5) years of experience performing procurement related activities, the preparation of bid specifications and the review and analysis of vendor bids, including two (2) years of supervisory experience.
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.
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 according to his or her own judgment, requesting supervisory assistance only when necessary. Special projects are managed with little oversight and assignments may be reviewed upon completion. Performance 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 in 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 in 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 at the college level or above. However, it may be obtained from experience and self-study.
Certification & Other Requirements	ubove. However, it may be obtained from experience and sen study.

KNOWLEDGE

- Federal Transit Administration third party contract language clauses and Buy America requirements;
- Applicable Public Contract Codes; Federal, State, and local laws, rules, and regulations pertaining to contracts and procurement, DBE programs, and prevailing wage law.
- State and local laws and regulations governing the expenditure of public funds
- Product lead times and bid cycle times
- Federal, State and local policies and regulations related to surplus disposal.
- State and local laws and regulations governing the expenditure of funds.
- Best principles, practices, and procedures for preparing technical specifications and bid documents.
- Market conditions and practices, current pricing, and product availability.
- Modern office procedures and workflow scheduling.
- Principles and procedures of budget preparation and forecasting.
- Principles and practices of supervision, training, and management.
- Product leads times and bid cycle times.
- Federal, State, and local policies and regulations relating to surplus disposal.
- Auditing techniques and procedures.
- Research methods and techniques.

SKILLS

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

ABILITIES

- Deal with bidders challenging technical specification and requesting authorization to supply substitutes for the items specified by the District.
- Coordinate surplus property disposal with the departments responsible for retiring the equipment.
- Coordinate workflow through the various layers within the department.
- Interpret requisitions, drawings, and draft specifications.
- Supervise, provide leadership, mentor, and solve conflicts.
- Deal with difficult people and situations.



- Learn District and departmental operating policies and procedures.
- Learn departmental systems and methods.
- Learn department-specific tasks and procedures.
- Speak clearly and communicate messages to appropriate individuals.
- Organize information clearly and precisely.
- Learn Federal Transit Administration third party contract language clauses and Buy America requirements.
- Learn materials, equipment, and supplies used in the maintenance and operation of a bus and light rail system.
- To work independently and use sound judgment.
- To strategize, advise, counsel and make recommendation to solve problems.
- Negotiate effectively.
- Establish, maintain, and foster positive and harmonious working relationships with those contacted in the course of work.



OVERALL PHYSICAL STRENGTH DEMANDS:

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

С	F	0	R	Ν
Continuously	Frequently	Occasionally	Rarely	Never
2/3 or more of the time.	From $1/3$ to $2/3$ of the time.	Up to 1/3 of the time.	Less than 1 hour per week.	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; observing work duties; communicating with co-workers
Sitting	F	Desk work; meetings
Walking	F	To other departments/offices/office equipment; around work site
Lifting	0	Files; supplies; equipment
Carrying	0	Files; supplies; equipment
Pushing/Pulling	F	File drawers; equipment; tables and chairs
Reaching	0	For supplies; for files
Handling	F	Paperwork
Fine Dexterity	С	Computer keyboard; calculator; telephone pad
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	N	
Bending	0	Retrieving items from lower shelves/ground
Twisting	0	From computer to telephone
Climbing	0	Stairs; step stool
Balancing	R	On equipment
Vision	С	Observing work site; reading; computer screen
Hearing	С	Communicating with co-workers and public and on telephone; listening to equipment
Talking	С	Communicating with co-workers and public and on telephone
Foot Controls	N	
Other		
(specified if applicable)		

MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, mobile phone, fax machine, copier, pallet jack, computer and associated hardware.



software.

and

ENVIRONMENTAL FACTORS:

С	F	0	R	Ν
Continuously	Frequently	Occasionally	Rarely	Never
	-Health a	nd Safety F	actors-	
-Health and Safety F Mechanical Hazards			R	
1.100 maniform Thubar as				
Chemical Hazards			R	
Electrical Hazards			R	
Fire Hazards			R	
Explosives			R	
Communicable Diseases			N	
Physical Danger or Abuse			R	
Other (see 1 below)			Ν	
(1) N/A				

D	W	М	S	Ν		
Daily	Several	Several	Seasonally	Never		
	Times Per	Times Per				
	Week	Month				
D	-Environmental Factors-					
Respiratory Hazards				N		
Extreme Temperatures				Ν		
Noise and Vibration				Ν		
Wetness/Humidity				Ν		
Physical Hazards			Ν			

PROTECTIVE EQUIPMENT REQUIRED:

NON-PHYSICAL DEMANDS:

F	0	R	Ν
Frequently	Occasionally	Rarely	Never
From $1/3$ to $2/3$ of the time	Up to 1/3 of the time	Less than 1 hour per week	Never occurs
-Des	-Frequency-		
Time Pressure			F
Emergency Situation			0
Frequent Change of Tasks	F		
Irregular Work Schedule/	R		
Performing Multiple Task	F		
Working Closely with Otl	F		
Tedious or Exacting Work			0
Noisy/Distracting Environment			0
Other (see 2 below)			N

(2) Office Environment and Warehouse

PRIMARY WORK LOCATION:

(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.