

REGIONAL TRANSIT ISSUE PAPER

Agenda Item No.	Board Meeting Date	Open/Closed Session	Information/Action Item	Issue Date
6	11/14/16	Open	Action	11/03/16

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

ISSUE

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

RECOMMENDED ACTION

Adopt Resolution No. 16-11-____, Amending Exhibit A of Resolution 16-10-0127, and Approving New and Modified Job Descriptions and the District's Authorized Classifications, Positions and Salary Grades.

FISCAL IMPACT

Positions	Grade	Annual Salary	Total position costs	FY17
Vice President, Administration*	III	\$ 155,000	\$ 241,333	\$ 80,444
Vice President, Finance/Chief Financial Officer*	IV	\$ 155,000	\$ 241,333	\$ 80,444
Total Position Costs			\$ 482,666	\$ 160,888
Defunded for FY17				
<i>Vice President, Business Support Services/Chief Financial Officer</i>				(\$ 274,523)
<i>Senior Labor Relations Analyst**</i>				(\$ 75,240)
Total Fiscal Impact				(\$ 188,874)

*Position cost based on anticipated hire date of March 1, 2017.

**Position was only funded at 50% for FY17.

DISCUSSION

Summary: The proposed personnel actions will result in the addition of 1 new position allocations (Vice President, Administration) within FY17. It will also result in the creation of 1 new job description (Vice President, Administration) and 1 modified job description (Vice President, Business Support Services/Chief Financial Officer to Vice President, Finance/Chief Financial Officer).

Executive Reorganization

To better position the District to meet its goal of achieving financial sustainability and an improved customer experience, staff have determined the need for an executive reorganization

Approved:

Presented:

Final 11/09/16

General Manager/CEO

Director, Human Resources

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within it Business Services Division. The purpose of this reorganization is to better serve the District's customers. With the reorganization comes changes in RT's reporting structure for the financial and business support functions within the District. The fiscal impact associated with these changes are indicated above.

Business Services Division

As part of the executive leadership reorganization, staff determined that there was a need to develop a position that would provide executive leadership over the business support functions of the District. Staff conducted a thorough analysis and benchmarking, creating a new job description, Vice President, Administration. The Vice President, Administration will report to the General Manager/CEO and will provide oversight to Human Resources, Labor Relations and Procurement.

The Job Evaluation Team (JET) determined that the compensable factors place this new job classification in Salary Grade III within the Management and Confidential Employee Group.

There is no fiscal impact associated with this action as cost savings from vacancies offset any new position costs. The change to the total number of authorized positions is reflected in Exhibit A.

Finance Division

In order to reach its goal of financial stability, staff has determined it is in RT's best interest to develop a position that will oversee and manage all financial functions. Currently this function is encompassed by the authorized job description of Vice President, Business Services/Chief Financial Officer. Upon review of this position, staff determined the need to remove all non-financial functions and modify the position to that of Vice President, Finance/Chief Financial Officer. This position will report to the General Manager/CEO and will oversee Finance, Treasury and the Office of Management and Budget.

Modifications to the job description and essential functions have been made and staff 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. The modified job description for the Vice President, Finance/Chief Financial Officer is included in Exhibit A.

Authorized Classifications, Positions and Salary Grades and Salary Grade 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.

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

New/Modified Job Descriptions

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

<u>Previous Job Title</u>	<u>Disposition</u>	<u>Modified and/or New Job Title</u>
N/A	New	Vice President, Administration
Vice President, Business Support Services/Chief Financial Officer	Modified	Vice President, Finance/Chief Financial Officer

Staff recommends approval of this action.

RESOLUTION NO. 16-11-_____

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

November 14, 2016

AMENDING EXHIBIT A OF RESOLUTION 16-10-0127 AND APPROVING NEW AND MODIFIED 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 November 15, 2016, Resolution No. 16-10-0127 is hereby amended by deleting Exhibit A and replacing it with attached Exhibit A "Authorized Classifications, Positions and Salary Grades".

THAT, effective November 15, 2016, the new and modified job descriptions of Vice President, Administration and Vice President, Finance/Chief Financial Officer, attached as Exhibit B, are hereby approved.

JAY SCHENIRER, Chair

A T T E S T:

HENRY LI, Secretary

By: _____
Cindy Brooks, Assistant Secretary

EXHIBIT A
Effective November 15, 2016
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	0	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	3	109
Senior Strategic Planner	1	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 Social Media & Website Specialist	1	109
Senior Systems Engineer	1	111
Service Planner	1	208
Vehicle Equipment Maintenance Specialist	0	207
Video Communications Systems Analyst	1	208
Total General Family Allocations:		43

* 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>MANAGEMENT & CONFIDENTIAL FAMILY:</u>	<u>Job Classification Titles</u>	<u>Authorized Positions</u>	<u>Grade</u>
	Accessible Services Administrator	1	110
	Administrative Assistant I (GM, Labor Relations & Legal Cost Centers)	0	200
	Administrative Assistant II (GM, Labor Relations & Legal Cost Centers)	2	202
	Attorney I	0	108
	Attorney II	0	110
	Attorney III	3	112
	Chief Counsel	1	**
	Chief Auditor	1	113
	Chief Safety Officer	1	113
	Clerk to the Board	1	208
	Community Bus Services Superintendent	0	110
	Deputy Chief Counsel	1	V
	Deputy General Manager	0	VI
	Deputy Chief Operating Officer	1	114
	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, Organizational Development	0	112
	Director, Planning	0	112
	Director, Procurement Services	1	112
	Director, Project Management	1	112
	Director, Marketing, Communications and Public Information	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
	Electronic Fare Collection Systems Administrator	1	110
	Executive Assistant	1	207
	General Manager/CEO	1	**
	Human Resources Administrator	1	110
	Human Resources Analyst I	1	205
	Human Resources Analyst II	2	208
	Labor Relations Analyst I	1	205
	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

* 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>
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 and End User Operations Administrator	1	110
Operations Training Administrator	0	110
Paralegal	0	205
Payroll Supervisor	1	109
Pension and Retiree Services Administrator	1	110
Principal Accountability & Compliance Auditor	0	112
Principal Civil Engineer	1	112
Principal Planner	1	110
Principal Systems Engineer	1	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
Risk Administrator	1	110
Risk Analyst I	0	204
Risk Analyst II	1	207
Senior Administrative Assistant	5	206
Senior Attorney	1	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
Transportation Superintendent - Police Services	1	110
Vice President, Accountability and Performance	1	III
*(1) Vice President, Administration	1	III
Vice President, Communications and Partnerships	1	III
Vice President, Finance / Chief Financial Officer	1	IV
Vice President, Security and Safety	1	IV
Vice President, Strategic Planning and System Development	1	IV
Vice President, Transit Services / Chief Operating Officer	1	V
Total Management and Confidential Allocations:	97	
Total District-wide Salaried Allocations:	140	

* 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>
<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
Communications Infrastructure Specialist	1	207
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	2	206
Maintenance Supervisor - Bus	8	***
Maintenance Supervisor - Light Rail	11	***
Maintenance Supervisor - Wayside	6	***
Maintenance Trainer - Bus	1	***
Maintenance Trainer - Light Rail	1	***
Marketing and Communications Specialist	1	206
Network Operations Engineer	2	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	55	***
<u>Total AFSCME 146 Allocations:</u>	149	

* 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>
<u>ATU 256 Family:</u>		
Accounting Technician	1	***
Accounts Payable Clerk	2	***
Claims Technician	1	***
Customer Service Clerk	1	***
Customer Service Representative	14	***
Transit Agent	30	***
Fare Prepayment Clerk	1	***
Operators (Bus, CBS and Light Rail combined)	475	***
Payroll Technician	1	***
Procurement Clerk	2	***
Reception Clerk	1	***
Revenue Clerk	3	***
Senior Clerk	1	***
Transit Fare Inspector	13	***
Treasury Clerk	1	***
<u>Total ATU 254 Allocations:</u>	<u>547</u>	
<u>IBEW 1245 Family:</u>		
Bus Service Worker	29	***
Electronic Mechanic	3	***
Facilities and Grounds Worker I	2	***
Facilities and Grounds Worker II	4	***
Facilities Electronic Technician	1	***
Facilities Maintenance Mechanic	16	***
Facilities Service Worker	9	***
Journey Lineworker	0	***
Light Rail Assistant Mechanic	8	***
Light Rail Service Worker	22	***
Light Rail Vehicle Technician	38	***
Lineworker	0	***
Lineworker Technician	20	***
Mechanic A	26	***
Mechanic A (Body/Fender)	7	***
Mechanic A (Gasoline/Propane)	2	***
Mechanic B	8	***
Mechanic C	17	***
Painter	1	***
Part-Time Cleaner	15	***
Rail Laborer	7	***
Rail Maintenance Worker	8	***
Senior Mechanic	0	***
Senior Rail Maintenance Worker	2	***
Storekeeper	10	***
Transit Cleaner	6	***
Upholsterer	1	***
<u>Total IBEW 1245 Allocations:</u>	<u>262</u>	
TOTAL AUTHORIZED ALLOCATIONS:	1098	

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(1) Increase in Position(s)
(2) Decrease in Position(s)
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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 Planner, Senior Strategic Planner, Principal Planner
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, Administrator
Information Technology Technician I, II
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 and End User Operations Administrator
Network Operations Technician, Video Communications Systems Analyst, Network and End User 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 New and Modified Job Descriptions
Effective November 15, 2016

Job Description - Previous Title	Disposition	Job Description - Modified / New Title
N/A	New	Vice President, Administration
Vice President, Business Support Services / Chief Financial Officer	Modified	Vice President, Finance / Chief Financial Officer



Title: Vice President, Administration

FLSA Status: Exempt

BRIEF DESCRIPTION:

The purpose of this position is to provide executive direction and management over the areas of Human Resources, Labor Relations and Procurement. The incumbent provides executive leadership and strategic direction in policy development activities for assigned areas and directs cross functional planning and major strategic level projects. This position provides support to the General Manager’s office for Board liaison and meetings support, interdepartmental coordination at the executive management level, and District-wide communications.

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
1	S	Human Resources: Provides executive oversight for the administration and maintenance of a comprehensive human resources program involving the development, administration, and implementation of personnel rules, regulations, policies and procedures. Human Resources responsibility areas include recruitment, testing, training, classification, compensation, benefits and pension administration.
2	S	Labor/Employee Relations: Serves as executive advisor to the negotiations team and sits as executive representative of management on the negotiation team, and reviews/approves grievances and arbitrations at the highest level as designated by the General Manager.
3	S	Procurement, Contracting and Disadvantaged Business Enterprise (DBE): Plan, organize, direct, and coordinate the full range of duties related to overseeing the expenditure of funds for goods, services, and capital assets, and to oversee the administration of the District’s Disadvantaged Business Enterprise (DBE) program. This includes compliance with all statutes, ordinances, rules, decrees, and other regulations associated with procurement, contracting, and DBE administration.
4	S	Serves as member of various teams and committees; represents the Executive Team in a variety of capacities as assigned. Formulates policies, procedures, and practices for the assigned functional areas and makes recommendations to Executive Team/General Manager and Board of Directors. Reviews, analyzes, and approves, for the General Manager, various actions such as hiring and appointment conditions, grievance settlements.
5	S	Under executive direction plans, organizes, directs and coordinates administrative requests directed to the General Manager’s Office related, but not limited to, personnel issues such as hiring, discipline, grievances and negotiations and labor/management relations.



6	S	Represents the District at national, state, and local conferences. Consults with other government agencies, the business community and private organizations to explore new ideas and resolve issues. Establishes and maintains an effective system of communications throughout the organization. Performs related duties as assigned.
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JOB REQUIREMENTS:

-Description of Minimum Job Requirements-	
Formal Education	Four (4) years of college resulting in a Bachelor’s degree or equivalent from an accredited college or university in Business Administration, Public Administration, Human Resources Management, Industrial Relations, Psychology, Sociology 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 ten (10) years of progressively responsible management experience in the administration of human resources management, labor and/or employee relations and procurement. Public sector experience is preferred.
Supervision	Work requires managing and monitoring work performance of a division including evaluating program/work objectives and effectiveness, establishing broad organizational goals and realigning work and staffing assignments for the department.
Human Collaboration Skills	Final decisions regarding policy development and implementation are made and/or recommended. Interaction with others outside the organization requires exercising participative management skills that support team efforts and quality processes.
Freedom to Act	The employee normally performs the duty assignments within broad parameters defined by general organizational requirements and accepted practices. End results determine effectiveness of job performance.
Technical Skills	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 as district wide fiscal responsibility. Assures that appropriate linkages exist between district-wide budget, funding limitations and service levels, to meet specific departmental and organizational goals. Monitors progress toward fiscal objectives and adjusts plans as necessary to reach them. Prepares agency financial statements and budget reports.
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

- District policies, procedures, and functions.
- Laws, ordinances, rules, regulations, and codes applicable to the functional areas.
- Budget development and administration.
- Interviewing and negotiations techniques.
- Governmental function, organization and relationships.
- Contract administration procedures.
- Legal terminology and basic court procedures.
- Labor Relations principles, practices, laws and regulations.
- Human Resources principles, practices, laws and regulations.
- Public procurement principles, practices, laws and regulations.
- Principles of Disadvantaged Business Enterprises and associated federal and state regulations.
- Public transit technology and information systems capabilities and issues.
- Procurement and contracting principles and practices.
- Principles of management, supervision and training.
- EEO principles, practices, laws and procedures.

SKILLS

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

ABILITIES

- Plan, organize, direct, coordinate and supervise work and staff engaged in the assigned functional areas.
- Gather, assemble, analyze and evaluate facts evidence, data and other information in order to draw reasonable and fair conclusions and make sound decisions.
- Interpret and apply laws, rules, regulations and legal precedents impacting the assigned area.
- Negotiate equitable settlements and solutions for grievances and other labor disputes, risk claims against the District and other settlements.
- Serve as an advisor to the General Manager and Board of Directors.
- Analyze and resolve a variety of complex organizational, staffing, space needs and other issues.
- Maintain comprehensive records and reports.
- Prepare clear and concise written and oral reports.
- Learn District policies, procedures and practices.
- Communicate clearly and effectively, both orally and in writing, with internal and external contacts.
- Establish and maintain cooperative working relationships.



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	F	Making presentations, observing work duties, communicating with co-workers
Sitting	C	Desk work, meetings
Walking	F	To other departments/offices/office equipment, around work site
Lifting	R	Files, supplies, equipment
Carrying	R	Files, supplies, equipment
Pushing/Pulling	O	File drawers, tables and chairs
Reaching	O	For supplies, for files
Handling	O	Paperwork
Fine Dexterity	O	Computer keyboard, calculator, telephone pad
Kneeling	R	Filing in lower drawers, retrieving items from lower shelves/ground
Crouching	R	Filing in lower drawers
Crawling	N	
Bending	R	Filing in lower drawers, retrieving items from lower shelves/ground
Twisting	R	From computer to telephone
Climbing	O	
Balancing	R	
Vision	C	Reading, computer screen
Hearing	C	Communicating with co-workers and public and on telephone
Talking	C	Communicating with co-workers and public and on telephone
Foot Controls	R	
Other (specified if applicable)		

MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, various office equipment, and computer and associated hardware and software.



ENVIRONMENTAL FACTORS:

C Continuously	F Frequently	O Occasionally	R Rarely	N Never
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D Daily	W Several Times Per Week	M Several Times Per Month	S Seasonally	N Never
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-Health and Safety Factors-	
Mechanical Hazards	N
Chemical Hazards	N
Electrical Hazards	N
Fire Hazards	N
Explosives	N
Communicable Diseases	R
Physical Danger or Abuse	N
Other (see 1 below)	N

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

(1) N/A

PROTECTIVE EQUIPMENT REQUIRED: None

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
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-Description of Non-Physical Demands-	-Frequency-
Time Pressure	F
Emergency Situation	O
Frequent Change of Tasks	O
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	N
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			

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: Vice President, Finance / Chief Financial Officer

FLSA Status: Exempt

BRIEF DESCRIPTION:

The purpose of this position is to provide executive direction and management over the area of Finance. The incumbent provides leadership and strategic direction in policy development activities for assigned areas and directs cross functional planning and major strategic level projects. This position provides support to the General Manager’s office for Board liaison and meetings support, interdepartmental coordination at the executive management level, and District-wide communications.

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
1	S	Accounting Management: Plan, organize, direct, and coordinate the full range of activities related to general ledger, accounts payable, payroll, accounts receivable, and the physical tracking and accounting of fixed assets. Accounts Payable: Assure the timely payment of all invoices and claims, tracking of the District’s liability on a daily basis, and the forecasting of future payment amounts and due dates. Accounts Receivable: Direct staff in the accounting and depositing of the District’s money. Payroll: Assure timely payroll to RT staff. Revenue: Plan, organize, direct, and coordinate the collection and recording of any cash revenue for RT, including daily cash collection from fare boxes and fare vending machines. Direct activities in revenue analysis and reconciliation with ridership counts. Treasury: Plan, organize, direct, and coordinate the cash management, investment, financing and banking/operational programs. Cash Management: Oversee cash flow analysis and the District’s investment account. Provide oversight for District and Pension investment programs and policies; plan and manage debt financing, leasing, and other financial strategies from development through selection, implementation, and monitoring.
2	S	Financial, Grants Management, and Administration: Plan, organize, direct, and coordinate the application for accounting and reporting on all grant revenue and expenditures. Budgeting: Plan, organize, direct, and coordinate the full-range of budgeting activities including budget analysis, development of both the operating and capital budgets (annual; multi-year) and (with Business Analysis and Reporting) financial forecasting scenarios. Responsibilities also include oversee the development of a comprehensive capital improvement program, the identification of grant opportunities, writing federal, state, and local grant applications, approve grant allocations for District divisions/departments, and track grant expenditures. Financial Analysis and Reporting: Plan, organize, direct, and coordinate the full-range of analysis and reporting activities, including perform the District’s financial analysis and overall financial performance monitoring. Also included is the development and analysis of fare policy and future year financial forecasting, and



	oversee the development and administration of external and internal reporting, including but not limited to National Transit Database (NTD) Reports, federal and state triennial reviews, Public Utilities Commission (PUC) reports, quarterly reporting, and monthly management reports. This function conducts special projects as required and chairs the Fare Policy Committee.
3 S	Executive duties: Serve as member of various teams and committees; represent the Executive Management Team in a variety of capacities as assigned. Formulate policies, procedures, and practices for the assigned functional areas and make recommendations to Executive Management Team, General Manager, and Board of Directors. Represent the District at national, state and local conferences. Consult with other government agencies, the business community, and private organizations to explore new ideas and resolve issues; establish and maintain an effective system of communications throughout the organization; and performs related duties as assigned.

JOB REQUIREMENTS:

-Description of Minimum Job Requirements-	
Formal Education	Four (4) years of college resulting in a Bachelor’s degree or equivalent from an accredited college or university in Accounting, Business, Public Administration, Finance, 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 ten (10) years of progressively responsible management experience in the administration of finance and accounting. Public sector experience is preferred.
Supervision	Work requires managing and monitoring work performance of a division including evaluating program/work objectives and effectiveness, establishing broad organizational goals and realigning work and staffing assignments for the department.
Human Collaboration Skills	Final decisions regarding policy development and implementation are made and/or recommended. Interaction with others outside the organization requires exercising participative management skills that support team efforts and quality processes.
Freedom to Act	The employee normally performs the duty assignments within broad parameters defined by general organizational requirements and accepted practices. End results determine effectiveness of job performance.
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 district wide fiscal responsibility. Assures that appropriate linkages exist between district-wide budget, funding limitations and service levels, to meet specific departmental and organizational goals. Monitors progress toward fiscal objectives and adjusts plans as necessary to reach them. Directs the preparation of agency financial statements and budget reports.



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	Certified Public Accountant (CPA) license preferred.

KNOWLEDGE
<ul style="list-style-type: none"> • Thorough knowledge of the principles and practices of public sector Financial management. • Laws, ordinances, rules, regulations, and codes applicable to the functional areas • Principles of administration, strategic planning processes and performance management • Principles, techniques and processes of government at the local, regional, state and federal levels • Principles, techniques, and practices of modern public and business administration • Principles and practices of accounting, auditing, and public finance, including budget preparation and control (capital and operating budgets); funding of major public works projects; financial administration; planning and forecasting; and operational and cost accounting; • District policies, procedures, and functions • Budget development and administration • Principles of management, supervision and training • Project oversight and project management techniques

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



ABILITIES

- Communicate effectively with stakeholders, external organizations and community groups about public transit and the goals/objectives of the District both orally and in writing
- Plan, organize, direct, implement, and evaluate the activities of the Finance & Budget Division, including the functions of Accounting & Budget Administration, Finance, and related activities
- Streamline financial and budgetary processes
- Demonstrate commitment to customer-focused operations, accountability, transparency, integrity and equity
- Effectively represent the District before the Board and other Federal, State, local and regional agencies, boards and commissions, an in public meetings and hearings.
- Establish and maintain effective working relationships with a diverse workforce including peers, staff, and consultants
- Develop and implement strategic plans, policies and procedures
- Inspire, manage and develop employees and effectively manage organizational change
- Maintain complete and accurate records and statistics and to develop meaningful reports from that information
- Demonstrate effective time management skills
- Plan, organize, direct, coordinate and supervise work and staff engaged in the assigned functional area
- Serve as an advisor to the General Manager/CEO
- Gather, assemble, analyze. and evaluate financial, customer and public information and make strategic analyses and financial projections
- Serve on assigned local, regional, and national committees
- Prepare clear and concise administrative and technical reports
- Prepare and monitor complex budgets
- Manage and supervise large numbers of employees and consultants effectively
- Interpret and apply laws, rules, regulations, and legal precedents impacting the assigned areas
- Maintain comprehensive records and reports
- Establish and maintain adequate cost and schedule controls
- Serve as a technical advisor to the General Manager and Board of Directors on a variety of issues
- Collect and analyze data and prepare comprehensive concise reports, and effectively represent the areas for which responsible to other District divisions, stakeholders, the community, and the appropriate governmental bodies
- Interpret and apply laws, rules. and regulations impacting the District’s finances
- Work effectively under stressful situations involving confrontation and conflict



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	F	Making presentations, observing work duties, communicating with co-workers and the public
Sitting	C	Desk work, meetings
Walking	O	To other departments/offices/office equipment, around work site
Lifting	O	Supplies, files
Carrying	O	Supplies, equipment, files
Pushing/Pulling	O	File drawers, tables, chairs
Reaching	O	For supplies, for files
Handling	C	Paperwork, files
Fine Dexterity	O	Computer keyboard, calculator, telephone pad
Kneeling	O	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	O	Filing in lower drawers, retrieving items from lower shelves/ground
Twisting	O	From computer to telephone, getting inside vehicle
Climbing	O	Stairs
Balancing	R	On step stool
Vision	C	Reading, computer screen, observing work site
Hearing	C	Communicating with co-workers and public and on telephone
Talking	C	Communicating with co-workers and public and on telephone
Foot Controls	R	Driving
Other (specified if applicable)		



MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, various office equipment, and computer and associated hardware and software.

ENVIRONMENTAL FACTORS:

C Continuously	F Frequently	O Occasionally	R Rarely	N Never
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D Daily	W Several Times Per Week	M Several Times Per Month	S Seasonally	N Never
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-Health and Safety Factors-	
Mechanical Hazards	R
Chemical Hazards	R
Electrical Hazards	R
Fire Hazards	R
Explosives	N
Communicable Diseases	R
Physical Danger or Abuse	R
Other (see 1 below)	N

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

(1) N/A

PROTECTIVE EQUIPMENT REQUIRED: None

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
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-Description of Non-Physical Demands-	-Frequency-
Time Pressure	F
Emergency Situation	O
Frequent Change of Tasks	F
Irregular Work Schedule/Overtime	F
Performing Multiple Tasks Simultaneously	F
Working Closely with Others as Part of a Team	F
Tedious or Exacting Work	F
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			

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.