



Title: Customer Advocate I

FLSA Status: Non-Exempt

BRIEF DESCRIPTION:

The purpose of this position is to assist customers by receiving and processing service complaints, comments, employee commendations and inquiries and to problem solve and mediate unexpected and unusual issues directly from the general public and determine potential Regional Transit policy and regulation compliance issues. This is accomplished by processing incoming customer contacts received through written and electronic correspondence and via telephone; maintaining records of all customer contacts in database; researching and resolving or escalating issues/comments to appropriate department; completing and obtaining customer signature on Passenger Service Reports (PSR) for official complaints; corresponds with customers regarding status of complaints. Other duties include tracking, recording and reporting information; preparing documents, reports and correspondence; coordinating schedules and meetings and completing related administrative duties.

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.
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#	Code	Essential Functions	% of Time
1	S	Acts as initial contact to the general public for comments regarding all agency services; provides information to customers by mail, e-mail or on the telephone; receives all positive and negative comments, suggestions and complaints from the public regarding operations issues (of Operators, schedules, Regional Transit policy and regulation compliance related, etc.) as well as all other agency services/projects; responsible for second level support related to Connect Card, RT Mobile Application and other RT branded products/support solutions by evaluating and analyzing the symptoms, renewing customers transactions/purchases and account information; documents information, inputs into automated tracking system, researches and resolves complaints as appropriate or obtains signature from customer, completes PSR as necessary and routes to appropriate department for follow-up and response; prepares initial written communication to advise customer of action taken in response to comment/issue; completes administrative support by preparing, proofreading, editing, revising and formatting correspondence and	70%



		documents, reviewing, scanning, identifying, indexing, and filing documents; generating standard responses verbally, in writing, or electronically to requests for information and distributing time-sensitive documents to appropriate staff.	
2	S	Prepares reports by entering, tracking, recording, and reporting data into automated database system; create and maintain spreadsheets; keeps status reports on information and records; tracks and reports on special information as needed; compiles data on customer issues or reporting process improvements; and utilizes application programs to chart and display recorded information for inclusion in reports; maintains customer contact database.	15%
3	S	Participates in, attends and prepares for various meetings and information/outreach events; coordinates meeting arrangements, prepares meeting materials and takes minutes; conduct observations of the District's bus and light rail system for compliance and to investigate customer issues, concerns and complaints and identifies and reports observed violations.	15%



JOB REQUIREMENTS:

-Description of Minimum Job Requirements-	
Formal Education	<p>Work requires the knowledge and ability to read and understand written instructions, basic operational, technical or office processes, and the routine operation of machines. Level of knowledge is equivalent to four (4) years of high school or equivalent.</p> <p>Additional directly related experience beyond the minimum requirement may substitute for the required education based on the ratio of one and a half (1.5) years of experience for each (1) year of education.</p>
Experience	A minimum of one (1) year of general office or administrative support experience which must have included substantial public contact and customer service work.
Supervision	Job has no responsibility for the direction or supervision of others.
Human Collaboration Skills	Work may require providing advice to others outside direct reporting relationships on specific problems or general policies. Contacts may require the consideration of different points of view to reach agreement. Elements of persuasion may be necessary to gain cooperation and acceptance of ideas.
Freedom to Act	The employee normally performs the duty assignment after receiving general instructions as to methods, procedures, and desired end results. There is some opportunity for discretion when making selections among a few, easily identifiable choices. The assignment is usually reviewed upon completion.
Technical Skills	Basic: Work requires the use of standard technical skills appropriate to the work environment of the organization.
Budget Responsibility	Position has no fiscal responsibility.
Reading	Intermediate - Ability to read papers, periodicals, journals, manuals, dictionaries, thesauruses, and encyclopedias. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study.
Math	Intermediate - Ability to deal with a system of real numbers; and practical application of fractions, percentages, ratios/proportions and measurement. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study.
Writing	Intermediate - Ability to write reports, prepare business letters, expositions, and summaries with proper format, punctuation, spelling, and grammar, using all parts of speech. Ordinarily, such education is obtained in high school up to college. However, it may be obtained from experience and self-study.
Certification & Other Requirements	Typing Certificate verifying minimum typing speed of 40 net words per minute.



KNOWLEDGE
<ul style="list-style-type: none">• Customer service and customer relations principles• General methods of tactful public communication• Telephone etiquette and procedure• Record keeping and filing methods• Methods and techniques of filing, tracking, recording, and presenting data• Practical application of computers and peripheral equipment.• Correct English usage, spelling, grammar and punctuation• Standard office machine usage

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

ABILITIES
<ul style="list-style-type: none">• Prioritize conflicting workload requirements• Handle all internal and external contacts with courtesy, diplomacy, and tact• Identify need and escalate priority issues• Read and interpret District policies• Appropriately classify complaints for handling• Effectively identify appropriate person/department to route complaints to• Write reports and business correspondence• Effectively present information and respond to questions from groups, managers, customers, and the general public• Establish and maintain effective working relationships with others• Deal with difficult people and situations• Learn District and departmental operating policies, procedures, systems and methods• Learn specific system processes, methods, tasks and procedures related to department and job• Stay current with system information, changes and updates• Gather customer information and determine issue by evaluating and analyzing systems• Organize information clearly and precisely• Take accurate notes and minutes for written meeting summaries• Prepare meeting agendas• Extract data and written information from reports and transfer to other documents• Learn the District's bus and light rail system and the geography of the local area



- Tabulate and summarize data, identify trends and prepare reports
- Work in a fast-paced environment and prioritize workload



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	Communicating with co-workers; observing work duties; observing work site
Sitting	C	Desk work; meetings; driving
Walking	F	To other departments/offices; around work site
Lifting	F	Supplies; equipment; files
Carrying	O	Supplies; equipment; files
Pushing/Pulling	O	File drawers; equipment; tables and chairs
Reaching	F	Supplies; files
Handling	C	Paperwork
Fine Dexterity	C	Computer keyboard; telephone keypad; calculator
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	R	Under equipment
Bending	O	Filing in lower drawers; retrieving items from lower shelves/ground
Twisting	O	From computer to telephone; getting inside vehicle
Climbing	R	Stairs; step stools
Balancing	R	On step stools
Vision	C	Reading; computer screen; driving
Hearing	F	Communicating via telephone/radio to co-workers/public
Talking	F	Communicating via telephone/radio to co-workers/public
Foot Controls	R	Driving
Other (specified if applicable)	N	

MACHINES, TOOLS, EQUIPMENT, SOFTWARE, AND HARDWARE:

Telephone, fax machine, copier, headphones, radio scanner, 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	N
Physical Danger or Abuse	N
Other (see 1 below)	N

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

(1) N/A

PROTECTIVE EQUIPMENT REQUIRED:

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	R
Frequent Change of Tasks	F
Irregular Work Schedule/Overtime	R
Performing Multiple Tasks Simultaneously	F
Working Closely with Others as Part of a Team	O
Tedious or Exacting Work	F
Noisy/Distracting Environment	O
Other (see 2 below)	N

(2) N/A

PRIMARY WORK LOCATION:

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

(3) N/A

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



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CLASS HISTORY:

Adopted: 07/2010
Revised: 06/2018
Title Change:
Maintenance
Update:
Abolished:
Job Key: 60004780