

STAFF REPORT



MEETING DATE:	July 1, 2024
SUBJECT:	Adopt Resolution 24-08 Which Revises Compensation for All Job Classifications Effective July 1, 2024; Adopts Additions and Changes to Various Job Specifications; and Approves Fiscal Year 2025/26 Cost-of-Living Adjustment for all Job Classifications, Effective July 1, 2025
WAGENDA ITEM:	9
STAFF CONTACT:	Sean Tiedgen, Executive Director

SUMMARY:

Periodically the board of directors' review agency compensation to ensure it is competitive with the existing market. The board last reviewed and approved changes in December 2022, with direction to review again in 2024. It is recommended that the board of directors' approve changes to compensation to all job classifications for fiscal year (FY) 2024/25, reclassify one position, and approve a maximum cost-of-living adjustment of three percent for FY 2025/26.

STAFF RECOMMENDATION:

It is recommended that the board of directors adopt Resolution 24-08 (attached), effective July 1, 2024, which authorizes the following:

- Revises SRTA's salary compensation for all job classifications per Attachment A to the resolution;
- New and updated job specifications for all job classifications as attached to the resolution, including reclassifying Administrative Associate to Executive Assistant; and
- Approves a fiscal year 2025/26 cost-of-living adjustment for all job classifications, effective July 1, 2025, equal to the Consumer Price Index, but capped at a maximum of three percent.

DISCUSSION:

SRTA policies (Section 5.05.040 – Compensation) state that as part of the board of directors' review of salary and benefits, the executive director will periodically review compensation to ensure it is competitive with current job markets (public and private) and labor market inflation. If appropriate, the executive director may recommend changes to reflect the market. Cost-of-living adjustments (COLA) were last reviewed and approved by the board of directors at the December 2022 meeting (weblink to December 2022 staff report: [10 Comp Budget COLAs \(ca.gov\)](#)). The board of directors also requested a full compensation study be conducted by June 2024 for review and consideration.

In January 2024, SRTA procured Bryce Consulting, Inc., to assist in conducting a salary compensation survey. The consultant prepared and presented a 2024 SRTA Compensation Study to the Fiscal & Policy Committee on April 15, 2024. Additional information was requested, and the committee met again on June 10, 2024, to review report updates, staff's analysis, make recommendations, and requested the executive director bring the item before the full board of directors for discussion.

The board of directors met on June 20, 2024, to review the report, agency funding, prior board actions, staffing and increased costs, and provided direction to staff. The attached resolution

supports SRTA policy to provide competitive compensation for each job classification that retains and attracts a quality workforce that is on par with the market. Additionally, it provides flexibility for responding to future workload needs such as increases in federal/state planning and programming responsibilities and requirements for fiscal reporting, accounting, and audits. Per board input, staff will review this topic again toward the end of FY 2025/26 and present necessary recommendations for board consideration.

ALTERNATIVES:

The board of directors may request changes to recommended items. The board of directors may request additional information and continue this item to a future meeting.

FISCAL & POLICY COMMITTEE RECOMMENDATION: The Fiscal & Policy Committee met on April 15, 2024, and June 10, 2024, to review items, request additional information, and to provide staff with recommendations to bring to the board of directors' for discussion.

FISCAL IMPACT:

SRTA's personnel budget for all direct and indirect expenses is estimated at \$1,509,339.80 for FY 2024/25. The net increase of the proposed changes for FY 2024/25 is estimated at \$67,310 (or 4.46 percent) of SRTA's personnel costs, including all direct and indirect expenses. This compensation change brings SRTA's salary compensation in alignment with comparable agencies. The proposed cost-of-living adjustment for FY 2025/26, if it reaches the cap of three percent, is estimated to increase SRTA's personnel costs \$46,000 (2.9 percent of personnel budget) or less.

The proposed changes are within anticipated federal and state revenues for SRTA's regional planning, programming, and administrative activities, which currently combine for over \$6.1 million in funds in FY 2024/25. The adopted changes will be reflected in a future amendment to SRTA's Overall Work Program (OWP). Compensation changes for FY 2025/26 will be included and discussed in the development of the FY 2025/26 OWP.



Sean Tiedgen, AICP, Executive Director

Attachment: Resolution No. 24-08

RESOLUTION 24-08



A RESOLUTION OF THE SHASTA REGIONAL TRANSPORTATION AGENCY WHICH REVISES COMPENSATION FOR ALL JOB CLASSIFICATIONS EFFECTIVE JULY 1, 2024; ADOPTS ADDITIONS AND CHANGES TO VARIOUS JOB SPECIFICATIONS; AND APPROVES FISCAL YEAR 2025/26 COST-OF-LIVING ADJUSTMENT FOR ALL JOB CLASSIFICATIONS, EFFECTIVE JULY 1, 2025

WHEREAS, Section 5.05.040 of SRTA's Human Resources Policies and Procedures outline that SRTA's compensation program is designed to attract, retain, motivate, and reward the best possible workforce in an equitable manner; and

WHEREAS, SRTA policies seek to provide competitive pay in relation to the job market, job responsibilities, and the required level of expertise, where agency circumstances allow; and

WHEREAS, SRTA policies state that the salary of each class shall be based on the principle that like salaries shall be paid for comparable duties and responsibilities and shall bear a reasonable relationship to prevailing rates of pay in other public jurisdictions and in local private employment; and

WHEREAS, maintaining and recruiting quality staff is essential to meeting agency goals and maximizing federal and state funds that come to the region; and

WHEREAS, periodically, as part of the board of directors' review of Salary and Benefits, the executive director or authorized designee will review the compensation plan to evaluate current market value and labor market inflation and recommend ranges be adjusted to reflect market changes; and

WHEREAS, on December 15, 2022, the board of directors' approved cost-of-living adjustments for Fiscal Year (FY) 2022/23 and 2023/24 and directed the executive director to conduct a compensation study with recommendations by June 2024; and

WHEREAS, the SRTA Board of Directors Fiscal and Policy Committee provides the highest level of management oversight related to SRTA financial operations, all policies, and human resource needs, and reviews and provides recommendations of fiscal and policy changes going to the board for approval; and

WHEREAS, a consultant was hired to conduct and prepare a compensation study report of comparable agencies consistent with prior board of director's approved methodology of evaluating agencies that are similar to SRTA based on size (i.e., number of employees and budget), staff responsibilities, and cost of living; and

WHEREAS, the compensation study found that in summary, for all Agency classifications surveyed, on average, the Agency is below the market for base salary, total cash, and total compensation when compared to the comparable market median and mean; and

WHEREAS, the Fiscal and Policy Committee and SRTA Board of Directors reviewed the results of the study and desires to provide compensation that is within the market median of comparable agencies; and

WHEREAS, wages are set by a compensation plan and, for the executive director, by employment agreement; and

WHEREAS, the SRTA Board of Directors may approve changes to compensation plans for all job classifications by resolution and may adjust compensation in the executive director's employment agreement by resolution without amending said agreement; and

WHEREAS, SRTA policies state the executive director or authorized designee is responsible for the management of job classifications compensated at or below the Senior Transportation Planner class; and

WHEREAS, SRTA consistently operates under budget; maintains ample financial reserves; and prepays post-retirement benefits to avoid unfunded liabilities.

NOW, THEREFORE, BE IT RESOLVED that the Board of the Directors of the Shasta Regional Transportation Agency:

1. Approves increases to SRTA's salary compensation plan for all SRTA job classifications as shown in Attachment A to this Resolution, effective July 1, 2024; and
2. Approves a cost-of-living adjustment for fiscal year 2025/26 based on the consumer price index, but capped at a maximum of three percent, effective July 1, 2025; and
3. Approves the reclassification of the Administrative Associate to Executive Assistant, the addition of various job classifications, and minor changes to other job classifications per Attachment B.

PASSED AND ADOPTED this first day of July, 2024, by the Board of Directors of the Shasta Regional Transportation Agency.

Mark Mezzano, Chair
Shasta Regional Transportation Agency

ATTEST:

Sean Tiedgen, AICP, Executive Director
Shasta Regional Transportation Agency

Attachments:

- A: Fiscal Year 2024/25 Salary Compensation Plan
B: Amended and New Job Classifications

Attachment "A"

**Shasta Regional Transportation Agency
Compensation Plan
Fiscal Year 2024/25 (Effective July 1, 2024)
Final Proposed Draft for Board of Directors Approval**

	Base Pay							
Job Title	Step	A	B	C	D	E	F	G (NEW)
CHIEF FISCAL OFFICER	Annual	\$ 105,269	\$ 110,531	\$ 116,064	\$ 121,867	\$ 127,962	\$ 134,368	\$ 141,086
	Monthly	\$ 8,772	\$ 9,211	\$ 9,672	\$ 10,156	\$ 10,663	\$ 11,197	\$ 11,757
	Hourly	\$ 50.61	\$ 53.14	\$ 55.80	\$ 58.59	\$ 61.52	\$ 64.60	\$ 67.83
SENIOR TRANSPORTATION PLANNER	Annual	\$ 95,597	\$ 100,381	\$ 105,394	\$ 110,656	\$ 116,189	\$ 122,013	\$ 128,107
	Monthly	\$ 7,966	\$ 8,365	\$ 8,783	\$ 9,221	\$ 9,682	\$ 10,168	\$ 10,676
	Hourly	\$ 45.96	\$ 48.26	\$ 50.67	\$ 53.20	\$ 55.86	\$ 58.66	\$ 61.59
ASSOCIATE TRANSPORTATION PLANNER	Annual	\$ 74,901	\$ 78,645	\$ 82,576	\$ 86,715	\$ 91,042	\$ 95,597	\$ 100,381
	Monthly	\$ 6,242	\$ 6,554	\$ 6,881	\$ 7,226	\$ 7,587	\$ 7,966	\$ 8,365
	Hourly	\$ 36.01	\$ 37.81	\$ 39.70	\$ 41.69	\$ 43.77	\$ 45.96	\$ 48.26
ASSISTANT TRANSPORTATION PLANNER	Annual	\$ 64,709	\$ 67,933	\$ 71,323	\$ 74,901	\$ 78,645	\$ 82,576	\$ 86,715
	Monthly	\$ 5,392	\$ 5,661	\$ 5,944	\$ 6,242	\$ 6,554	\$ 6,881	\$ 7,226
	Hourly	\$ 31.11	\$ 32.66	\$ 34.29	\$ 36.01	\$ 37.81	\$ 39.70	\$ 41.69
ADMINISTRATIVE ASSOCIATE / EXECUTIVE ASSISTANT	Annual	\$ 57,158	\$ 60,029	\$ 63,024	\$ 66,186	\$ 69,493	\$ 72,966	\$ 76,606
	Monthly	\$ 4,763	\$ 5,002	\$ 5,252	\$ 5,515	\$ 5,791	\$ 6,081	\$ 6,384
	Hourly	\$ 27.48	\$ 28.86	\$ 30.30	\$ 31.82	\$ 33.41	\$ 35.08	\$ 36.83
ADMINISTRATIVE ASSISTANT II (NEW)	Annual	\$ 44,782	\$ 47,029	\$ 49,379	\$ 51,854	\$ 54,434	\$ 57,158	\$ 60,029
	Monthly	\$ 3,732	\$ 3,919	\$ 4,115	\$ 4,321	\$ 4,536	\$ 4,763	\$ 5,002
	Hourly	\$ 21.53	\$ 22.61	\$ 23.74	\$ 24.93	\$ 26.17	\$ 27.48	\$ 28.86
ADMINISTRATIVE ASSISTANT I (NEW)	Annual	\$ 36,858	\$ 38,688	\$ 40,622	\$ 42,661	\$ 44,782	\$ 47,029	\$ 49,379
	Monthly	\$ 3,071	\$ 3,224	\$ 3,385	\$ 3,555	\$ 3,732	\$ 3,919	\$ 4,115
	Hourly	\$ 17.72	\$ 18.60	\$ 19.53	\$ 20.51	\$ 21.53	\$ 22.61	\$ 23.74
ACCOUNTING CLERK III (NEW)	Annual	\$ 59,384	\$ 62,358	\$ 65,478	\$ 68,744	\$ 72,176	\$ 75,795	\$ 79,581
	Monthly	\$ 4,949	\$ 5,197	\$ 5,457	\$ 5,729	\$ 6,015	\$ 6,316	\$ 6,632
	Hourly	\$ 28.55	\$ 29.98	\$ 31.48	\$ 33.05	\$ 34.70	\$ 36.44	\$ 38.26
ACCOUNTING CLERK II (NEW)	Annual	\$ 51,293	\$ 53,872	\$ 56,555	\$ 59,384	\$ 62,358	\$ 65,478	\$ 68,744
	Monthly	\$ 4,274	\$ 4,489	\$ 4,713	\$ 4,949	\$ 5,197	\$ 5,457	\$ 5,729
	Hourly	\$ 24.66	\$ 25.90	\$ 27.19	\$ 28.55	\$ 29.98	\$ 31.48	\$ 33.05
ACCOUNTING CLERK I (NEW)	Annual	\$ 42,203	\$ 44,325	\$ 46,530	\$ 48,859	\$ 51,293	\$ 53,872	\$ 56,555
	Monthly	\$ 3,517	\$ 3,694	\$ 3,877	\$ 4,072	\$ 4,274	\$ 4,489	\$ 4,713
	Hourly	\$ 20.29	\$ 21.31	\$ 22.37	\$ 23.49	\$ 24.66	\$ 25.90	\$ 27.19
ACCOUNTING CLERK APPRENTICE/INTERN (Varies by Program) (NEW)	Annual	\$33,280 - \$39,520						
	Monthly	\$2,773 - \$3,293						
	Hourly	\$16.00 - \$19.00						
EXECUTIVE DIRECTOR ¹	Annual	\$181,688						
	Monthly	\$15,141						
	Hourly	\$87.35						

[illegible]

¹The Executive Director salary is established by employment agreement between the board and the executive director. The salary is not subject to "steps." This position may receive cost of living increases commensurate with all other staff.

²The "Maximum Performance Based Compensation" represents the maximum possible added compensation on an annual basis. The increase is based on annual review of employee performance and ranges from 0-5%.



~~July 2024~~ January 2023

FSLA: Non-Exempt

CHIEF FISCAL OFFICER - CONFIDENTIAL

SALARY RANGE

~~\$50,614~~ \$42,450 - ~~\$71,225~~ \$59,720 Hourly

~~\$8,772~~ \$7,358 - ~~\$12,345~~ \$9,352 Monthly

~~\$105,269~~ \$88,296 - ~~\$124,217~~ \$148,136 Annually

(see [Employee Benefits Summary](#) for additional benefits)

JOB DESCRIPTION

Under general [direction, plans, organizes, directs, and performs complex professional accounting supervision, performs complex professional accounting](#) work, including auditing, analyzing, and verifying financial records; prepares financial statements and statistical reports; provides information to SRTA staff, management, and board of directors regarding accounting practices and procedures; reconciles general ledger accounts; processes reimbursement billings to all funding agencies; organizes and maintains accounting database systems; participates in the preparation of SRTA's budgets and Overall Work Program; prepares interim and year-end financial statements and audit schedules; performs day-to-day human resources administration and office management duties; assists with benefits administration; provides complex technical and responsible support to the ~~E~~xecutive ~~D~~irector; and performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the ~~E~~xecutive ~~D~~irector. Exercises ~~no direct~~ supervision over [fiscal staff and oversight of consultants on a day-to-day or project basis.](#) ~~staff. Exercises technical direction and training to agency staff and oversight of consultants on a day-to-day or project basis.~~

CLASS CHARACTERISTICS

This is a ~~professional~~ [professional](#) accounting classification [that performs limited supervisory responsibilities including planning, assigning, and evaluating the work of subordinates.](#) Incumbents exercise a high level of discretion and independent judgment in performing the full range of routine to complex accounting, financial record-keeping, payroll, day-to-day human resources, benefits administration, and risk management functions. Successful performance of the work requires extensive knowledge of generally accepted accounting principles; expertise in reporting and accounting under the Governmental Accounting Standards Board standards; the ability to implement the provisions of the Office of Management and Budget Circulars; fund accounting; fiscal management; and general office management. Incumbents will develop indirect cost rates and proposals as well as allocate costs. Must have extensive knowledge in the design and implementation of internal controls. Must be able to communicate technical information verbally and in writing to non-accounting professionals, the public, and the SRTA Board of Directors.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

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

- Recommends and assists in the implementation of goals and objectives; establishes schedules and methods for finance, human resources, benefits administration, and risk management activities; implements policies and procedures.
- Plans, prioritizes, assigns, supervises, and reviews the work of staff assigned to finance and administrative activities.
- Evaluates operations and activities of assigned responsibilities; recommends improvements and modifications; prepares various reports on operations and activities.
- Participates in the selection of staff; coordinates staff training; conducts performance evaluations; recommends discipline; implements discipline procedures as directs.
- In collaboration with external vendors, plans, manages, and participates in the operations and activities of SRTA's accounting programs and functions, including accounts payable and receivable, audits, budgeting, financial analysis, procurement, cash management, and payroll.
- Works with banks on deposits, electronic banking, and lines-of credit.
- Maintains internal control policies and procedures. Identifies and writes new policies and procedures.
- Provides complex professional assistance in the administration and implementation of SRTA's financial, revenue, budget, auditing, and accounting programs, including financial statements, budget monitoring, forecasting, financial analysis, reimbursement billings, and grants accounting.
- Analyzes and reconciles expenditure and revenue accounts, verifying availability of funds and classification of expenditures; researches and analyzes transactions to resolve problems.
- Coordinates monthly and year-end general ledger closing; prepares journal entries with proper documentation; posts and balances general ledger accounts; ensures compliance and accuracy in accordance with generally accepted accounting procedures and principles.
- Coordinates and administers a wide variety of financial and accounting programs, including accounts receivable, accounts payable, reimbursement billings, investments, capital assets, and payroll.
- Participates in the compilation and preparation of annual budgets, including assisting other staff with budget preparation, providing revenue and expense projections, monitoring expenditures, and preparing and updating cash flow and projections.
- Participates in the preparation of audited financial statements, audit schedules and reports for external auditors and assists in the annual auditing process.
- Processes and reconciles revenues, expenditures, and technical transactions in compliance with all applicable federal, state, and local laws, rules, regulations, and ordinances.
- Researches and analyzes financial data and develops a wide variety of financial reports and statements.
- Organizes and maintains the grants and accounting system databases; develops and produces customized reports; ensures and verifies the accuracy of information.

- Reviews and processes grant invoices; monitors compliance with contracts and budgets; reconciles data from the grant database to the general ledger.
- Coordinates, prepares, processes, and maintains payroll; receives, reviews, verifies, and processes time-recording documents and ensures compliance with agency policies and applicable federal, state, and local laws, rules, and regulations.
- Prepares comprehensive financial and accounting activity studies, statistics, statements, and reports, including cash flows, historical summaries, charts, graphs, and various memos and letters.
- Receives, reviews, and processes various reports and records including payment authorizations and bank statements, checks, and receipts.
- Researches and analyzes technical transactions to resolve questions and validate data; ensures fiscal accountability and fund integrity for transactions and supporting documentation.
- Assists with benefits administration, including maintaining flexible benefits accounts, processing enrollment and termination, and reviewing invoices and allocating benefits costs to appropriate accounts; prepares and reports pension and deferred compensation to providers.
- Assists with a variety of human resources administration activities related to recruitment, new employee orientation, and salary administration; coordinates classification and compensation administration.
- Performs risk management duties in matters relating to worker's compensation, liability, and property damage claims; ensures that safety issues and concerns of employees and the public are addressed.
- Interprets, explains, and applies general and governmental accounting/auditing principles and procedures, laws, and regulations affecting the financial operations of regional government; provides professional and technical guidance and training to other staff and board members in accounting processes and procedures.
- Maintains a variety of working and official personnel files; ensures the confidentiality of such files.
- Uses a variety of standard office equipment, including a computer, in the performance of the work.
- Attends meetings, conferences, workshops, and training sessions, and reviews publications to remain current on principles, practices, and new developments in accounting and finance.
- Assists the executive director with special projects as required.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- [Principles of supervision, training, and performance evaluations.](#)
- Modern principles, practices, and methods of public and governmental accounting and financial analysis, including program budgeting and auditing, payroll processing, grant accounting, indirect cost allocations, internal accounting controls and the application to public agency operations.

- General principles and practices of data processing and its applicability to accounting and public agency operations.
- Payroll record-keeping, processing, and reporting and payment requirements of various state and federal agencies and benefit providers.
- Basic principles and procedures of human resources and benefits administration and risk management.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Research and reporting methods, techniques, and procedures.
- Technical report writing and preparation of correspondence.
- Modern office practices, methods, and computer equipment and applications related to the work.
- Record keeping principles and procedures.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively making presentations and representing SRTA in contacts with governmental agencies, various business, professional, educational, and regulatory organizations, and with vendors and the public.
- Techniques for providing a high level of customer service by effectively working with the public, vendors, contractors, and SRTA staff.
- Common accounting software platforms, including QuickBooks.
- Common office software such as Microsoft Office products (Word, Excel, Outlook, and PowerPoint) and Adobe products (Reader and Acrobat).

Ability to:

- [Organize, implement and direct finance, human resources, benefits administration, and risk management activities.](#)
- [Supervise, train, and evaluate staff.](#)
- Analyze financial data and draw sound conclusions.
- Implement generally accepted accounting principles and reporting requirements of the Governmental Accounting Standards Board.
- Interpret financial statements and monitor financial information of sub-recipients.
- Prevent and detect breakdowns in internal controls related to potential fraud and embezzlement.
- Assess and report to management organizational and industry financial risks.
- Prepare clear, complete, and concise financial statements and reports.
- Review, post, balance, reconcile and maintain accurate and confidential payroll and employee personnel and benefits records.
- Work closely with staff and management to maintain a high level of integrity and confidentiality when dealing with sensitive and complex payroll and employee benefits issues.
- Analyze, interpret, summarize and present administrative and technical information and data effectively.
- Interpret, apply, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.

- Make accurate arithmetic, financial, and statistical computations.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software application programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines in politically sensitive situations.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

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

~~A~~Equivalent to a bachelor's degree from an accredited college or university with major coursework in accounting, finance, business or public administration, or a closely related field and five (5) years of responsible professional public accounting and auditing experience and/or governmental accounting experience.

Licenses and Certifications:

- Possession of, or ability to obtain, a valid California driver's license by time of appointment.
- Possession of a valid license as a Certified Public Accountant is desirable.

PHYSICAL DEMANDS

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

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.



July 2024³
FLSA: Non-Exempt

SENIOR TRANSPORTATION PLANNER

SALARY RANGE

\$~~45,962.45~~ - \$~~64,6759.72~~ Hourly
\$~~7,966358~~ - \$~~11,2090,352~~ Monthly
\$~~95,59788,296~~ - \$~~134,50824,217~~ Annually
(see [Employee Benefits Summary](#) for additional benefits)

DEFINITION

Under general direction, plans, organizes, and participates in the most complex and difficult work of professional transportation planners related to the development of transportation plans, studies, projects, and programs for the RTPA and its member agencies; plans, develops, implements, and manages complex planning projects; directs the work of a major planning program; develops and completes technical assessments, written project analyses, and performs highly complex technical writing and organization assignments, including presentations to the RTPA board, committees, and outside parties; provides professional advice and assistance to the public on transportation planning projects, studies, and programs; completes applications for grants; provides highly complex professional assistance to the executive director and the public in areas of expertise; performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the executive director. May exercise technical and functional direction over and provide training to lower-level staff on a project or day-to-day basis.

CLASS CHARACTERISTICS

This class is the advanced journey-level class in the professional transportation planner series with responsibilities spanning the full spectrum of routine to highly complex transportation planning responsibilities. Responsibilities include managing transportation planning studies, land use and transportation programs, congestion management programs, as well as, overseeing consultant and local jurisdictional relationships. Successful performance of the

work requires a broad professional transportation planning background and skill in coordinating assigned work with that of other agencies. This class is distinguished from the associate transportation planner in that it is the highest-level class in the professional planning series with project and/or day-to-day supervisory responsibility over other professional planning staff, in addition to handling the most complex and sensitive planning projects.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

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

- Plans, organizes, and participates in a wide range of routine to highly complex transportation plans, programs, projects, and studies.
- Serves as project manager on transportation planning and development projects, which includes overseeing application and plan review, coordination with project applicants and agencies, background research, environmental review, preparation of public notices and staff reports, scheduling meetings and hearings, and monitoring project implementation to verify conformance with approved plans, grant/loan requirements, conditions, and mitigation measures.
- Manages, reviews, and presents complex transportation planning studies; conducts site and policy background research to obtain information for the preparation of staff reports, correspondence, memoranda, policy and procedure documents, and presentations to management or governing bodies; reads, interprets, analyzes, and explains a wide variety of technical documents, studies, and practices, and performs highly complex technical writing and organization assignments.
- Conducts the research and analysis necessary to prepare technical reports, administer programs, and manage funds and resources for a variety of RTPA projects and programs.
- Prepares comprehensive environmental impact analysis and related studies on construction projects and programs undertaken by the RTPA.
- Prepares grant applications for funds available under various state and federal programs.
- Reviews, analyzes, prepares comments on, and implements various rules, regulations, legislation relating to transportation and environmental impact matters.
- Participates in the development of policy recommendations, implementing actions and financial estimates; coordinates the budgetary oversight of transportation funding requirements to local jurisdictions and Caltrans.
- Ensures compliance with the California Environmental Quality Act (CEQA) and the National Environmental Policy Act (NEPA) and related environmental mandates.
- Has regular interaction with the RTPA board, officials from the California Transportation Commission (CTC), local, state and federal agencies.
- Implements public outreach/involvement programs pursuant to RTPA procedures and environmental mandates.

- Prepares and provides presentations to the RTPA board of directors, partner agencies, private organizations and the public.
- Oversees the development of consultant requests for proposals and qualifications for professional services; evaluates proposals and recommends project award; develops and reviews contract terms and amendments; ensures contractor compliance with RTPA standards and specifications and time and budget estimates; reviews and updates deliverables; analyzes and resolves complex problems that may arise.
- Tracks project expenditures, reviews invoices for accuracy and consistency with contractual obligations, recommends appropriate dispersals of allocated funds.
- Coordinates and facilitates meetings with task forces, working groups, and representatives of other agencies in order to discuss items of common interest, develop project study reports, and clarify project specifications, financial details, and project schedules.
- Performs funding/grant development and administration, including conducting grant research, writing proposals, and programming and administering awarded grant funds.
- Manages relationships between member agencies and state and federal officials to effectively carry out the implementation and management of transportation plans, programs, and projects; ensures that procedures and information are delivered to the applicants as well as to state and federal regulators in a timely fashion.
- Conducts environmental reviews of projects; evaluates impacts to transportation infrastructure and develops mitigations of those impacts.
- Compiles information for a variety of studies and reports; researches, analyzes, and interprets transportation, social, economic, population, and land use data and trends; develops and implements recommendations; prepares written reports on various transportation planning matters; develops, implements, and administers major portions of the countywide transportation plan.
- Researches, collects, records, analyzes, interprets, and summarizes statistical and demographic information; prepares spreadsheets and establishes and maintains a comprehensive database.
- Prepares staff reports, presentations, project information and status, and program financial information to various committees, community groups, and professional organizations about the RTPA's transportation projects and programs.
- Participates on a variety of committees and task forces; attends and participates in professional groups and committees; stays abreast of new trends and innovations related to transportation planning.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Advanced principles, practices, and funding sources for transportation and land use planning programs, studies, and projects.

- Principles and practices of program and project management.
- Basic principles of employee supervision, work assignment, direction, and training.
- Advanced principles and techniques of conducting analytical studies, evaluating alternatives, and making sound recommendations.
- Theories and methods related to transportation planning, travel forecasting and capacity, environmental issues, and implementation strategies.
- Principles, practices, and techniques of complex technical writing and organization assignments and the development of presentations.
- Grant application, preparation and administration.
- Contract management practices in a public agency setting.
- Operational characteristics, services, and activities of a comprehensive transportation planning program.
- Recent developments, current literature, and sources of information related to transportation planning and environmental review.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Research and reporting methods, techniques, and procedures.
- Record keeping principles and procedures.
- Statistical research methods as applied to the collection and tabulation of data affecting public planning and methods of graphic illustration and presentation.
- Modern office practices, methods, and computer equipment and applications related to the work.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing the RTPA in contacts with governmental agencies, various business, professional, educational, and regulatory organizations, and with contractors and the public.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and RTPA staff.

Ability to:

- Administer complex, technical, and sensitive transportation planning and related programs in an independent and cooperative manner.
- Identify and respond to issues and concerns of the public, board, and other commissions and regulatory agencies.
- Prepare complex plans, proposals, grant applications, and environmental review documents for planning projects.
- Direct and oversee the work of less experienced planning personnel.
- Prepare and present major planning studies utilizing various sources of information.
- Perform highly complex technical writing and organization assignments and develop presentations.
- Interpret, apply, explain, and ensure compliance with federal, state, and local policies, procedures, laws, and regulations.

- Research, analyze, interpret, summarize, and present technical information and data in an effective manner.
- Prepare clear and effective reports, correspondence, and other written material.
- Make accurate arithmetic, financial, and statistical computations.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs, such as transportation and air quality modeling, spreadsheets, graphics, desktop publishing, project management, presentations, obtaining current legislative and agency information via the Internet, database development and maintenance.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines in politically sensitive situations.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

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

Equivalent to graduation from an accredited four-year college or university with major coursework in transportation, urban, or regional planning, transportation/traffic engineering, or a closely related field and five (5) years of progressively responsible experience in transportation and/or transit planning or professional experience in planning, zoning and related activities, or two (2) years of experience equivalent to an associate transportation planner. Experience with complex technical writing and organization assignments and the development of presentations is required.

Licenses and Certifications:

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.
- Certification from the American Institute of Certified Planners (AICP) is within two (2) years of hire dated desired.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various RTPA and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required.

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

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.



July 2024³
FLSA: Non-exempt

ASSOCIATE TRANSPORTATION PLANNER

SALARY RANGE

\$~~36,011.98~~ - \$~~50,6745.02~~ Hourly
\$~~5,5436,242~~ - \$~~8,7837,803~~ Monthly
\$~~66,51874,901~~ - \$~~105,39093,642~~ Annually
(see [Employee Benefits Summary](#) for additional benefits)

DEFINITION

Under general supervision, an Associate Transportation Planner supports or leads various plans, studies, programs, and projects that carry out the agency's mission; coordinates and collaborates with local, regional, state, and federal partners; performs technical planning assignments in areas of expertise; performs complex writing and technical presentations, including staff reports and oral presentations to the SRTA Board of Directors, local agency councils/boards, and community organizations; provides professional advice and assistance to the public on transportation- and mobility-related issues; completes grant applications; administers procurement processes and manages contracts with consultants and vendors; and other related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the executive director. Exercises no supervision of staff.

CLASS CHARACTERISTICS

This is the journey-level class in the professional transportation planning series. Incumbents are expected to perform the full range of professional and technical planning work in transportation planning, and to provide project and fiscal management in accordance with agency policies. Positions at this level are distinguished from the assistant-level by the performance of the full range of duties as assigned, working independently, and exercising judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. This class is distinguished from the senior transportation planner in that the latter is the

advanced journey-level class in the series and is responsible for organizing and reviewing the work of other professional, technical, and/or contract staff and for training other staff, in addition to performing the more complex planning and project management activities.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

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

- Plans, organizes, and participates in a variety of routine to complex transportation plans, programs, projects, and studies.
- Serves as project manager on transportation planning and development projects, which includes performing application and plan review, coordination with project applicants and agencies, background research, environmental review, preparation of public notices and staff reports, scheduling meetings and hearings, and participating in project implementation in conformance with approved plans, grant/loan requirements, conditions, and mitigation measures.
- Develops and presents complex transportation planning studies; conducts site and policy background research to obtain information for the preparation of staff reports, correspondence, memoranda, policy and procedure documents, and presentations to management or governing bodies; reads, interprets, analyzes, and explains a wide variety of technical documents, studies, and practices, and performs routine to complex technical writing and organization assignments.
- Conducts the research and analysis necessary to prepare technical reports, administer programs, and manage funds and resources for a variety of RTPA projects and programs.
- Prepares environmental impact analysis and related studies on construction projects and programs undertaken by the RTPA.
- Prepares grant applications for funds available under various state and federal programs.
- Reviews, analyzes, prepares comments on, and implements various rules, regulations, legislation relating to transportation and environmental impact matters.
- Participates in the development of policy recommendations, implementing actions and financial estimates.
- Ensures compliance with the California Environmental Quality Act (CEQA) and the National Environmental Policy Act (NEPA) and related environmental mandates.
- Has occasional interaction with the RTPA board, officials from the California Transportation Commission (CTC), local, state and federal agencies.
- Implements public outreach/involvement programs pursuant to RTPA procedures and environmental mandates.
- May prepare and provide presentations to the RTPA board of directors, partner agencies, private organizations and the public.
- Participates in the development of consultant requests for proposals and qualifications for professional services; assists in the evaluation of proposals; develops and reviews

contract terms and amendments; ensures contractor compliance with RTPA standards and specifications and time and budget estimates; reviews and updates deliverables; analyzes and resolves problems that may arise.

- Tracks project expenditures, reviews invoices for accuracy and consistency with contractual obligations, recommends appropriate dispersals of allocated funds.
- Coordinates and facilitates meetings with task forces, working groups, and representatives of other agencies in order to discuss items of common interest, develop project study reports, and clarify project specifications, financial details, and project schedules.
- Performs funding/grant development and administration, including conducting grant research, writing proposals, and administering awarded grant funds.
- Facilitates relationships between member agencies and state and federal officials to effectively carry out the implementation and management of transportation plans, programs, and projects; ensures that procedures and information are delivered to the applicants as well as to state and federal regulators in a timely fashion.
- Conducts environmental reviews of projects; evaluates impacts to transportation infrastructure and develops mitigations of those impacts.
- Compiles information for a variety of studies and reports; researches, analyzes, and interprets transportation, social, economic, population, and land use data and trends; develops and implements recommendations; prepares written reports on various transportation planning matters; develops, implements, and administers portions of the countywide transportation plan.
- Researches, collects, records, analyzes, interprets, and summarizes statistical and demographic information; prepares spreadsheets and establishes and maintains a comprehensive database.
- Prepares staff reports, presentations, project information and status, and project financial information to various committees, community groups, and professional organizations about the RTPA's transportation projects and programs.
- Participates on a variety of committees and task forces; attends and participates in professional groups and committees; stays abreast of new trends and innovations related to transportation planning.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles, practices, and funding sources for transportation planning and congestion management programs and projects.
- Principles and practices of program and project management.
- Principles and techniques of conducting analytical studies, evaluating alternatives, and making sound recommendations.

- Transportation planning principles, concepts, standards, and practices.
- Statistical research methods as applied to the collection and tabulation of data affecting public planning.
- Principles, practices, and techniques of technical writing and organization assignments and the development of presentations.
- Grant application preparation and grant administration.
- Purposes, policies, procedures and regulations of city councils, county board of supervisors, and a Regional Transportation Planning Agency or Metropolitan Planning Organization boards.
- Methods of graphic illustration and presentation.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility, such as the California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA).
- Recent and on-going developments, legislation, current literature, and sources of information related to the operations of the RTPA.
- Record keeping principles and procedures.
- Modern office practices, methods, and computer equipment and applications related to the work.
- Technical report writing, English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing the RTPA in contacts with governmental agencies, community groups, and various business, professional, regulatory, and legislative organizations.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and RTPA staff.

Ability to:

- Collect, analyze, interpret, and apply data to various transportation planning projects and present technical information and data in an effective manner.
- Prepare and present planning research studies.
- Perform complex technical writing and organization assignments and develop presentations.
- Interpret, apply, explain, and ensure compliance with federal, state, and local laws, codes, and regulations and RTPA policies and procedures.
- Understand the organization and operation of the RTPA and of outside agencies as necessary to assume assigned responsibilities.
- Prepare clear and effective reports, correspondence, and other written material.
- Effectively represent the RTPA in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Make accurate arithmetic, financial, and statistical computations.
- Maintain accurate logs, records, and written records of work performed.

- Operate modern office equipment including computer equipment and specialized software applications programs.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

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

Equivalent to graduation from an accredited four-year college or university with major coursework in transportation, urban, or regional planning, transportation/traffic engineering, or a closely related field and two (2) years of professional transportation planning experience at the level of an assistant transportation planner.

Licenses and Certifications:

- Possession of, or ability to obtain, a valid California driver's license by time of appointment.
- Certification from the American Institute of Certified Planners ~~within four (4) years of hire-date~~(AICP) is desired.

PHYSICAL DEMANDS

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

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact

with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.



July 2024~~3~~
FLSA: Non-Exempt

ASSISTANT TRANSPORTATION PLANNER

SALARY RANGE

\$~~31.11~~^{27.62} - \$~~43.77~~^{38.87} Hourly

\$~~5,392~~^{4,787} - \$~~7,587~~^{6,737} Monthly

\$~~64,709~~^{57,450} - \$~~91,040~~^{80,850} Annually

(see [Employee Benefits Summary](#) for additional benefits)

DEFINITION

Under the direction and supervision of the executive director, participates in routine work of professional transportation planners related to the development of transportation plans, programs, and projects; assists in developing and completing technical assignments; prepares written reports and oral presentations, including presentations to the SRTA Board of Directors; provides assistance to the public on transportation- and mobility-related issues; assists in completing applications for grants; provides assistance to other professional planning staff and the public in areas of expertise; and performs other related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives direct supervision from the executive director; receives technical and functional direction and training from a senior planner. Exercises no supervision of staff.

CLASS CHARACTERISTICS

This is the entry-level class in the professional transportation planning series. Initially under close supervision, incumbents with technical, paraprofessional, or basic professional transportation planning experience perform basic professional and technical transportation planning work. As experience is gained, assignments become more varied and are performed with greater independence. Positions at this level usually perform most of the duties required of the positions at the associate level but are not expected to function at the same skill level and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. This class is typically entered into through experience at a technical or paraprofessional level that has

increased in complexity and through additional function-specific professional education or training.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

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

- Participates in basic to routine to complex transportation plans, programs, projects, and studies.
- Assists project managers on transportation planning and development of projects, which includes learning to perform application and plan review, conduct background research, schedule meetings, and participate in project implementation in conformance with approved plans, grant/loan requirements, conditions, and mitigation measures.
- Assists in developing and presenting basic transportation planning studies; learns to conduct site and policy background research to obtain information for the preparation of staff reports, correspondence, memoranda, policy and procedure documents, and presentations to management; reads, interprets, analyzes, and explains a variety of technical documents, studies, and practices, and performs routine technical writing and organization assignments.
- Assists in conducting the research and analysis necessary to prepare technical reports, administer programs, and manage funds and resources for basic RTPA projects and programs.
- Assists in preparing grant applications for funds available under various state and federal programs.
- Learns and implements various rules, regulations, legislation relating to transportation and environmental impact matters.
- Ensures compliance with the California Environmental Quality Act (CEQA) and the National Environmental Policy Act (NEPA) and related environmental mandates.
- Supports other professional planning staff in the interaction with the RTPA board, officials from the California Transportation Commission (CTC), local, state and federal agencies.
- Assists in implementing public outreach/involvement programs pursuant to RTPA procedures and environmental mandates.
- Prepares and provides presentations to management.
- Assists in the development of consultant requests for proposals and qualifications for professional services; assists in the evaluation of proposals; monitors contractor compliance with RTPA standards and specifications and time and budget estimates; assists in reviewing and updating deliverables; analyzes problems that may arise and brings to the attention of more experienced planning staff.
- Learns to track project expenditures and review invoices for accuracy and consistency with contractual obligations.

- Participates in meetings with task forces, working groups, and representatives of other agencies.
- Compiles information for a variety of studies and reports; researches, analyzes, and interprets transportation, social, economic, population, and trends; prepares written reports on basic transportation planning matters; assists in developing, implementing, and administering portions of the countywide transportation plan.
- Researches, collects, records, analyzes, interprets, and summarizes statistical and demographic information; prepares spreadsheets and establishes and maintains a database.
- Prepares basic staff reports, presentations, and project information for other professional planning staff in support of information provided to various committees, community groups, and professional organizations about the RTPA's transportation projects and programs.
- Participates on a variety of committees and task forces; attends and participates in professional groups and committees; stays abreast of new trends and innovations related to transportation planning.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles, practices, and funding sources for transportation planning and congestion management programs and projects.
- Basic principles and practices of program and project management.
- Principles and techniques of conducting analytical studies, evaluating alternatives, and making sound recommendations.
- Basic transportation planning principles, concepts, standards, and practices.
- Basic principles, practices, and techniques of technical writing and organization assignments and the development of presentations.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility, such as the California Environmental Quality Act (CEQA) and National Environmental Policy Act (NEPA).
- Recent and on-going developments, legislation, current literature, and sources of information related to the operations of the RTPA.
- Record keeping principles and procedures.
- Modern office practices, methods, and computer equipment and applications related to the work.
- Technical report writing, English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing the RTPA in contacts with governmental agencies, community groups, and various business, professional, regulatory, and legislative organizations.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and RTPA staff.

Ability to:

- Analyze, interpret, summarize, and present technical information and data in an effective manner.
- Perform technical writing and organization assignments and develop presentations.
- Interpret, apply, explain, and ensure compliance with federal, state, and local laws, codes, and regulations and RTPA policies and procedures.
- Understand the organization and operation of the RTPA and of outside agencies as necessary to assume assigned responsibilities.
- Prepare clear and effective reports, correspondence, and other written material.
- Make effective presentations to the public and local agencies.
- Effectively represent the RTPA in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Make accurate arithmetic, financial, and statistical computations.
- Maintain accurate logs, records, and written records of work performed.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience:

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

Equivalent to graduation from an accredited four-year college or university with major coursework in transportation, urban, or regional planning, transportation/traffic engineering, or a closely related field. No experience is required; one (1) year of technical or paraprofessional experience in an appropriate field related to area of assignment is desirable.

Licenses and Certifications:

Possession of, or ability to obtain, a valid California driver's license by time of appointment.

PHYSICAL DEMANDS

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

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

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.



~~July 2024~~
January 2023
FLSA: Non-Exempt

EXECUTIVE ASSISTANT~~ADMINISTRATIVE ASSOCIATE~~

SALARY~~COMPENSATION~~ RANGE

~~\$27,482.95~~ - ~~\$38,672.28~~ Hourly

~~\$4,7633.978~~ - ~~\$6,7035.595~~ Monthly

~~\$57,15847.736~~ - ~~\$80,43767.142~~ Annually

(see [Employee Benefits Summary](#) for additional benefits)

DESCRIPTION

Under general supervision, performs a variety of routine to complex office administrative, secretarial, accounting, building management, and clerical duties in support of the executive director and staff, including preparing agenda packets and handling sensitive and confidential legal and personnel material; composes and prepares correspondence using considerable judgment in content and style; performs skilled word processing, data entry and uploads website content; conducts basic accounting including review of payroll, processes billings and invoices, and benefit administration; coordinates assigned programs, projects, and services with other Agency functions and outside agencies; interacts frequently with board members, the public and other public agencies; provides information or directs questions and requests to the appropriate staff; procures and manages building maintenance and office supply vendor contracts; assist with managing building lease agreements and addressing lessee needs; organizing and coordinating required staff training; and, performs other duties as required.

SUPERVISION RECEIVED AND EXERCISED

~~Receives general supervision from the executive director. Exercises no supervision over staff.~~

CLASS CHARACTERISTICS

This is ~~an~~ the advanced journey level in the experienced administrative office ~~series~~ support ~~classification~~. Positions at this level are distinguished from other classes within the series by the level of responsibility assumed, complexity of duties assigned, independence of action taken, and the nature of public contact made. ~~Incumbents perform a wide variety of specialized administrative support work for the executive director and Agency staff.~~ Responsibilities include performing specialized, confidential, and technical office support duties for the Executive Director and Agency staff to ensure efficient agency service. Responsibilities require the use of tact, discretion, and independent judgment as well as knowledge of Agency activities. Work requires interpretation and application of policies, procedures, and regulations and involves frequent contact with the public, as well as, performing various research, office management, personnel, accounting, contract management, and budgetary support functions.

SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from the Executive Director. Exercises no supervision over staff.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

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

- Relieves the Executive Director and other staff of a variety of administrative details by assisting with duties of a routine to complex, sensitive, and confidential nature; plans, organizes, and carries out administrative assignments and special projects; recommends organizational or procedural changes affecting support activities; recommends improvements in workflow, procedures, and use of equipment and forms.
- Serves as clerk to assigned committees and boards; prepares, posts, and distributes agenda materials including public notices, agenda reports, resolutions, and other meeting packet materials; creates, updates, and maintains mailing lists databases; attends meetings and takes minutes; compiles and arranges materials for mailings; frequently interacts with board members to share information and schedule regular and sub-committee meetings.
- Performs skilled word processing and data entry using independent judgment and discretion in composing, formatting, and editing correspondence, presentations, and reports.
- Processes and reviews invoices and supporting documentation, including ensuring compliance with contracts and working with Agency staff and contractors to resolve invoice related matters.
- Prepares requests for, procures, and manages various contracts for the Agency including building maintenance, landscaping, janitorial, office and building supplies, or other responsibilities as assigned.
- Gathers, assembles, updates, and distributes a variety of Agency-specific information, documents, forms, records, and data as requested; provides detailed review to ensure accuracy, consistency and completeness.
- Maintains and updates Agency record systems and specialized databases.
- Assists with preparing, amending and executing tenant lease agreements; receives and addresses lessee needs, issues or complaints; enforces compliance with lease agreements
- Assist with maintaining internal control policies and procedures.
- Assists staff with invoicing and contract management.
- Conducts and assists with basic accounting such as data entry, invoice routing, and bank statement reconciliations.
- Develops, composes, types, edits, and proofreads a variety of complex documents, including forms, memos, administrative, statistical, financial, and staff reports, and correspondence for the Executive Director and other Agency staff; checks draft documents for punctuation, spelling, and grammar; makes or suggests corrections to drafts.
- Provides information to the public, including contractors and vendors, by phone or in person to ensure an understanding of Agency policies and procedures; listens to questions and explains procedures according to existing guidelines; responds to citizen and staff inquiries and complaints; refers citizens to the appropriate Agency sources; coordinates or resolves

problems of a moderate nature when appropriate.

- Organizes and maintains various administrative, reference, imaging, and follow-up files; purges files in accordance with the records retention policy.
- Prepares and updates agency policies; assists in ensuring staff are aware of and comply with agency policies.
- Verifies and reviews forms and reports for completeness and conformance with established regulations and procedures; applies Agency and program policies and procedures in determining completeness of applications, records, and files.
- Operates a variety of standard office equipment, including job-related computer hardware and software applications, multi-function copiers, postage meters, multi-line telephones, and transcription equipment; may operate other department-specific equipment.
- Assists with the human resources functions of the Agency, including processing and maintaining employee files, personnel forms, performance evaluation forms, disciplinary forms, and leave forms; files pertinent documents, maintains files in a secure location, and provides information to management as requested; participates in employee evaluations or disciplinary actions at the discretion of management.
- Maintains calendars and makes meeting arrangements; schedules meetings between Agency staff and other groups or organizations; arranges for necessary set-up and materials to be available at meetings.
- Organizing required staff trainings.
- Coordinates travel arrangements and accommodations for staff and submits all required paperwork.
- Maintains the Agency website.
- Monitors and orders office and other related supplies.
- Assists or administers assigned projects and/or programs as assigned; assists Agency staff in various research projects.
- Organizes and carries out a wide variety of administrative assignments; researches, compiles, and organizes information and data from various sources on a variety of specialized topics related to programs in assigned area; checks and tabulates standard mathematical or statistical data; prepares and assembles reports, manuals, articles, announcements, and other informational materials.
- Evaluates the operations and activities of the office; recommends improvements and modifications; prepares various reports on operations and activities; considers resource availability; negotiates timelines as needed.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Modern executive administrative, office management and secretarial practices and procedures, including the use of standard office equipment.
- Organization and function of public agencies, including the role of appointed boards and committees.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility, including open public meeting laws associated with the Brown Act.

- Government procurement procedures and practices, including public works contracting.
- Principles and procedures of record keeping and reporting.
- Basic accounting and payroll record-keeping, processing, reporting and payment requirements.
- Business letter writing and the standard format for reports and correspondence.
- Principles and practices of report formatting and preparation.
- Computer applications related to the work, including Microsoft Word, Excel, Outlook, Adobe, basic web design. Experience with Adobe InDesign.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for providing a high level of customer service to public and Agency staff, in person, through correspondence, and over the telephone.

Ability to:

- Maintain confidentiality and be discreet in handling and processing confidential information and data.
- Maintain confidentiality when handling employee personal information and exercise diplomacy and tact when handling personnel matters or issues, including employee performance evaluations, complaints, standards of conduct, or disciplinary actions and compliance with Human Resource policies.
- Interpret, apply, and explain applicable federal, state, and local laws, rules, regulations, policies, and timelines, as well as complex administrative and Agency policies and procedures.
- Perform responsible executive administrative support work with accuracy, speed, and minimal supervision.
- Understand the organization and operation of the Agency and of outside agencies as necessary to assume assigned responsibilities.
- Compose correspondence and reports independently or from brief instructions.
- Make accurate arithmetic and financial computations.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Maintain and update specialized database and electronic records systems.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Work with multiple Agency staff to address and prioritize diverse needs, at times with little notice.
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Establish, maintain, and foster positive and effective working relationships with staff, the Agency board and others contacted in the course of work.

Education and Experience:

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

Graduation from high school and five years of increasingly responsible administrative support experience, including government experience involving public contact. Relevant post high-school training, certificate, or associate degree is highly desirable.

Licenses and Certifications:

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

PHYSICAL DEMANDS

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

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may periodically travel and work offsite for training, workshops, or meetings.



July 2024
FLSA: Non-Exempt

ADMINISTRATIVE ASSISTANT I/II

SALARY RANGE

\$17.72 - \$30.30 Hourly

\$3,071 - \$5,252 Monthly

\$36,858 - \$63,025 Annually

(see [Employee Benefits Summary](#) for additional benefits)

JOB DESCRIPTION

Under supervision, performs a variety of responsible administrative and customer support duties for the Agency including receiving and responding to inquiries from the public, other Agency staff and outside agencies; prepares documents, correspondence and routine reports; receives and processes payments; and performs other duties as required.

CLASS CHARACTERISTICS

Administrative Assistant I - This is the entry level class in the Administrative Assistant series. Positions in this class typically require little directly related work experience. The Administrative Assistant I class is distinguished from the II level by the performance of less than the full range of duties assigned to the II level. Incumbents work under close supervision while learning job tasks, progressing to relatively less supervision as procedures and processes of assigned area of responsibility are learned.

Administrative Assistant II - This is the journey level class in the Administrative Assistant series and is distinguished from the I level by the assignment of the full range of duties. Employees at this level receive relatively less instruction or assistance and are fully aware of the operating procedures and policies within the work unit. Positions in this class are normally filled by advancement from the I level once the incumbent meets the qualification standards of the II level, demonstrates an ability to perform the full scope of the work, otherwise meets performance standards, and any assessment requirements to move to the II level.

This classification is distinguished from the Executive Assistant to the Executive Director in that the latter performs the more complex administrative support duties including directly supporting the Executive Director and serving as Clerk to the Board.

SUPERVISION RECEIVED AND EXERCISED

Administrative Assistant I – Receives immediate supervision from an assigned supervisor.

Administrative Assistant II - Receives general supervision from an assigned supervisor.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

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

- Serves as first line of contact to external customers via telephone or in person; responds to questions or complaints or refers customers to appropriate staff; provides a variety of general information regarding RTPA services; and explains operating policies and procedures.
- Prepares, compiles, tabulates and maintains operational data.
- Types and proofreads a variety of documents including general correspondence, agendas, reports, memos and statistical reports.
- Orders, maintains and reconciles purchases of office supplies, merchandise and other special purchases related to RTPA operations; maintains inventory.
- Receives and processes applications and related documentation, explains application process, reviews applications for completeness, and performs data entry.
- Receives, sorts, opens, time stamps and distributes time mail.
- Performs administrative tasks in support of special projects which may include the collection, review, compilation and verification of information.
- Develops and maintains a variety of files and records.
- Creates, edits, and updates information on website.
- Performs other duties as assigned.

QUALIFICATIONS

ADMINISTRATIVE ASSISTANT I

Knowledge of:

- Computer applications related to the work, including Microsoft Word, Excel, Outlook, Adobe, basic web design.
- Oral and written communication skills; business English including vocabulary, spelling, and correct grammatical usage and punctuation.
- Safe work practices.
- Principles and practices of excellent customer service.

Ability to:

- Learn RTPA services, policies and procedures.
- Develop and maintain filing systems.
- Compose general correspondence and letters.
- Understand and carry out oral and written instructions and prioritize workload to meet deadlines.
- Read, write and comprehend the English language at a level necessary for effective job performance exercising correct English usage, vocabulary, spelling, grammar and punctuation.
- Communicate effectively, tactfully and positively in both oral and written form.
- Operate and use modern office equipment and technology, including computers and applicable

software.

- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with staff, the Agency board and others contacted in the course of work.

ADMINISTRATIVE ASSISTANT II

In addition to the qualifications for the Administrative Assistant I:

Knowledge of:

- Advanced customer service techniques.
- Basic accounting principles; financial record keeping and reporting.
- Basic accounting record-keeping, processing, reporting and payment requirements.
- Routine business letter writing and the standard format for reports and correspondence.

Ability to:

- Independently perform administrative and customer service duties.
- Research, respond to and assist in the resolution of inquiries and complaints.
- Prepare correspondence, memorandums, and routine financial and operational reports.
- Make accurate arithmetic and financial computations.
- Establish and maintain a variety of filing, record keeping, and tracking systems.

Education and Experience:

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

Administrative Assistant I - Graduation from high school and one year of increasingly responsible administrative support and customer service experience.

Administrative Assistant II - Graduation from high school and two years of experience similar to that of an Administrative Assistant I with SRTA.

Licenses and Certifications:

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

PHYSICAL DEMANDS

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

calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may periodically travel and work offsite for training, workshops, or meetings.



July 2024
FLSA: Non-Exempt

ACCOUNTING CLERK III

SALARY RANGE

\$28.55 - \$40.17 Hourly

\$4,949 - \$6,964 Monthly

\$59,384 - \$83,564 Annually

(see [Employee Benefits Summary](#) for additional benefits)

JOB DESCRIPTION

Under direction, organizes, assigns, reviews, and performs a variety of complex clerical accounting duties in support of SRTA operations; prepares, maintains, and processes accounting records and financial transactions; and performs other duties as required.

CLASS CHARACTERISTICS:

This is the advanced journey level class in the Accounting Clerk series. Positions at this level are distinguished from other classes within the series by the level of responsibility assumed, complexity of duties assigned, independence of action taken, by the amount of time spent performing the duties, and by the nature of the public contact made. Employees perform the most difficult and responsible types of duties assigned to classes within this series, including provision of technical and functional supervision and performance of advanced journey level activities. Employees at this level are required to be fully trained in all procedures related to assigned areas of responsibility.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from an assigned supervisor. May exercise technical and functional supervision over lower-level staff.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

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

- Plans, prioritizes, leads, reviews, and participates in the work of staff engaged in clerical accounting activities of the Agency which may include accounts payable, accounts receivable, and payroll.
- Develops schedules and methods to accomplish assignments ensuring all work is completed in a timely and efficient manner.

- Participates in evaluating the activities of staff, recommending improvements and modifications.
- Provides or coordinates staff training.; works with employees to correct deficiencies.
- Reviews general ledger accounts for accuracy and potential adjustment; runs reports in the accounting system as necessary; and prepares monthly closing journal entries and monthly reporting.
- Gathers, tabulates, and proofreads complex statistical and financial data.
- Works with ledger accounts and other records; maintains subsidiary ledgers; accumulates records and statistics related to SRTA operations.
- Assists with the processing and preparation of payroll including tabulating and data entry of payroll deductions; reviews and corrects payroll entries; reviews and distributes biweekly payroll reports; and receives and processes unemployment claims information.
- Reviews invoices for complete and accurate coding, taxes, discounts and totals; matches invoices to purchase orders; allocates purchases to correct accounts.
- Researches and resolves the more complex accounts payable discrepancies; responds to vendor questions regarding invoices.
- Maintains records of monies received; post to ledgers, reconciles, balances and audits accounts; assists in preparing financial statements; quarterly tax returns and fiscal year end reports; completes bank deposit documentation.
- Performs other duties as assigned.

QUALIFICATIONS

Knowledge of:

- Mathematical calculations.
- Advanced methods and practices of bookkeeping and financial/statistical record keeping.
- Practices of handling cash and various methods of payment.
- Business letter writing and the standard format for reports and correspondence.
- Computer applications related to the work, including Microsoft Word, Excel, and Outlook.
- Principles and practices of technical and functional supervision and training.
- Oral and written communication skills; business English including vocabulary, spelling, and correct grammatical usage and punctuation.
- Safe work practices.
- Advanced customer service techniques.

Ability to:

- Provide technical and functional supervision over assigned staff; effectively train staff.
- Perform advanced accounting clerical duties in support of SRTA operations.
- Make accurate mathematical calculations.
- Independently perform responsible clerical accounting duties.
- Respond to and assist in resolving difficult and/or sensitive inquiries related to financial accounting records and processes.

- Prepare correspondence, memorandums, and financial reports.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Compose general correspondence and letters.
- Understand and carry out oral and written instructions and prioritize workload to meet deadlines.
- Read, write and comprehend the English language at a level necessary for effective job performance
- Exercising correct English usage, vocabulary, spelling, grammar and punctuation.
- Communicate effectively, tactfully and positively in both oral and written form.
- Operate and use modern office equipment and technology, including computers and applicable software.
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with staff, the Agency board and others contacted in the course of work.

Education and Experience:

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

Graduation from high school and two years of experience similar to that of an Accounting Clerk II with SRTA.

Licenses and Certifications:

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

PHYSICAL DEMANDS

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

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may periodically travel and work offsite for training, workshops, or meetings.



July 2024
FLSA: Non-Exempt

ACCOUNTING CLERK I/II

SALARY RANGE

\$20.29 - \$34.70 Hourly

\$3,517 - \$6,015 Monthly

\$42,203 - \$72,185 Annually

(see [Employee Benefits Summary](#) for additional benefits)

JOB DESCRIPTION

Under supervision, performs a variety of clerical accounting duties in support of SRTA operations; prepares, maintains, and processes accounting records and financial transactions; and performs other duties as required.

CLASS CHARACTERISTICS:

Accounting Clerk I - This is the entry level class in the Accounting Clerk series. Positions in this class typically require little directly related work experience. The Accounting Clerk I class is distinguished from the II level by the performance of less than the full range of duties assigned to the II level. Incumbents work under close supervision while learning job tasks, progressing to relatively less supervision as procedures and processes of assigned area of responsibility are learned.

Accounting Clerk II - This is the journey level class in the Accounting Clerk series and is distinguished from the I level by the assignment of the full range of duties. Employees at this level receive relatively less instruction or assistance and are fully aware of the operating procedures and policies within the work unit. Positions in this class are normally filled by advancement from the I level once the incumbent meets the qualification standards of the II level, demonstrates an ability to perform the full scope of the work, otherwise meets performance standards, and any assessment requirements to move to the II level.

This classification is distinguished from the Accounting Clerk III in that the latter performs the more complex clerical accounting duties.

SUPERVISION RECEIVED AND EXERCISED

Accounting Clerk I – Receives immediate supervision from an assigned supervisor.

Accounting Clerk II - Receives general supervision from an assigned supervisor.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

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

- Reviews general ledger accounts for accuracy and potential adjustment; runs reports in the accounting system as necessary; and prepares monthly closing journal entries and monthly reporting.
- Gathers, tabulates, and proofreads statistical and financial data.
- Works with ledger accounts and other records; maintains subsidiary ledgers; accumulates records and statistics related to SRTA operations.
- Checks forms, records, reports, and other materials for accuracy, completion and conformance with established procedures and makes routine follow-up if necessary to secure additional information.
- Assists with the processing and preparation of payroll including tabulating and data entry of payroll deductions; reviews and corrects payroll entries; reviews and distributes biweekly payroll reports; and receives and processes unemployment claims information.
- Reviews invoices for complete and accurate coding, taxes, discounts and totals; matches invoices to purchase orders; allocates purchases to correct accounts.
- Researches and resolves accounts payable discrepancies; responds to vendor questions regarding invoices.
- Maintains records of monies received; post to ledgers, reconciles, balances and audits accounts; assists in preparing financial statements; quarterly tax returns and fiscal year end reports; completes bank deposit documentation.
- Processes checks, credit card payments, electronic fund transfers and file transfers to financial institutions.
- Provides clerical support to department staff; makes copies of documents as needed; handles correspondence by typing memoranda, letters and reports as required; distributes correspondence, and processes incoming and outgoing mail.
- Performs other duties as assigned.

QUALIFICATIONS

ACCOUNTING CLERK I –

Knowledge of:

- Computer applications related to the work, including Microsoft Word, Excel, and Outlook.
- Basic methods of record keeping.
- Basic mathematical calculations.
- Oral and written communication skills; business English including vocabulary, spelling, and correct grammatical usage and punctuation.
- Safe work practices.
- Principles and practices of excellent customer service.

Ability to:

- Learn SRTA services, policies and procedures.
- Perform accounting clerical duties in support of SRTA operations.
- Make accurate mathematical calculations.
- Compose general correspondence and letters.
- Understand and carry out oral and written instructions and prioritize workload to meet deadlines.
- Read, write and comprehend the English language at a level necessary for effective job performance exercising correct English usage, vocabulary, spelling, grammar and punctuation.
- Communicate effectively, tactfully and positively in both oral and written form.
- Operate and use modern office equipment and technology, including computers and applicable software.
- Enter and retrieve data from a computer with sufficient speed and accuracy to perform assigned work.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with staff, the Agency board and others contacted in the course of work.

ACCOUNTING CLERK II -

In addition to the qualifications for the Accounting Clerk I:

Knowledge of:

- Advanced customer service techniques.
- Methods and practices of bookkeeping and financial/statistical record keeping.
- Practices of handling cash and various methods of payment.
- Routine business letter writing and the standard format for reports and correspondence.

Ability to:

- Independently perform responsible clerical accounting duties.
- Respond to and assist in resolving inquiries related to financial accounting records and processes.
- Prepare correspondence, memorandums, and financial reports.
- Establish and maintain a variety of filing, record keeping, and tracking systems.

Education and Experience:

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

ACCOUNTING CLERK I - Graduation from high school and one year of increasingly responsible clerical accounting experience.

ACCOUNTING CLERK II - Graduation from high school and two years of experience similar to that of an Accounting Clerk I with SRTA.

Licenses and Certifications:

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

Physical Demands

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

Environmental Elements

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may periodically travel and work offsite for training, workshops, or meetings.