



SACRAMENTO AREA COUNCIL OF GOVERNMENTS  
CLASSIFICATION PLAN

Adopted by SACOG Board of Directors  
September 20, 2007



# TABLE OF CONTENTS

SECTION I — INTRODUCTION.....	1
Plan Objectives.....	1
SECTION II — CONCEPTUAL FRAMEWORK.....	2
Classification Levels.....	3
Classification Series.....	5
Flexible Staffing.....	7
Class Specification Format.....	10
Definition of Levels of Supervision.....	11
Allocation Factors.....	13
SECTION III — CLASSIFICATION PLAN.....	15
Classification List.....	16
Class Specifications.....	18
Accounting Classes.....	19
Administrative Classes.....	29
Communications Classes.....	44
Executive Classes.....	56
Information Technology Classes.....	61
Management Classes.....	67
Planning Classes.....	71
Research Classes.....	78
Staff Assistant.....	87
Student Intern.....	89



## SECTION I — INTRODUCTION

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This classification plan constitutes an update of that plan and covers all positions within the organization. Section II summarizes the major classification concepts used in the classification plan and includes a description of the format used to define the class specifications. Section III presents a classification list and the class specifications for all classes recommended in the class plan. This introduction section of the report addresses the classification study objectives and methodology.

## SECTION II — CONCEPTUAL FRAMEWORK

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The classification analysis, as applied to SACOG, relies upon sound principles of job evaluation and job analysis. The approach identifies classes that reflect distinct differences in levels and types of work as determined through the use of established allocation factors and class concepts.

The concepts addressed include:

- Classification Levels

- Classification Series

- Flexible Staffing

- Class Specification Format

- Definitions of Levels of Supervision

- Allocation Factors

## **CLASSIFICATION LEVELS**

Position classification represents the grouping of all jobs within SACOG into a systematic classification structure based on the inter-relationship of the duties performed, the nature and level of responsibilities, and other work-related requirements of the jobs. Within the classification plan, it is possible to generally categorize classifications according to the following levels:

### Class Level

Trainee

Entry

Journey

Advanced Journey/Supervisor

Principal/Manager

Director

Executive Director

Within each job family, there may exist a classification at every level or only at selected levels. The levels within the job families reflect SACOG's needs and priorities. In some positions, there is no need for functions to be performed at the trainee or principal/manager level. Therefore, there would be no trainee- or principal-level classification in that particular job family. Furthermore, it is important to note that while two given jobs may both contain, for example, a journey-level classification, the two journey-level classes may be treated differently for compensation purposes. Distinctions between class levels for all types of job families may be expressed in terms of the general amount of responsibility to be assumed within each class level. The following subsections generally define the responsibilities to be assumed at each class level identified.

### Trainee

Trainee-level classes are designed to provide employees with a short-term formal training program in professional work areas in order to prepare for advancement to the next higher-level class in the series. Once training has occurred, the employee is promoted to the entry-level class and expected to apply the aforementioned training.

### Entry

Entry-level classes are designed to provide an on-the-job training opportunity to an employee who had limited directly related work experience and is not yet prepared to perform the full range of work assigned to the journey-level class.

### Journey

Journey-level classes are designed to recognize those positions that require the incumbent to perform a broad range of tasks, usually under general supervision. A journey-level position is fully trained in the scope of duties associated with this level.

### **Advanced Journey/Supervisor**

Advanced journey-level classes possess a specialized technical or functional expertise. They typically are assigned significant responsibilities above the journey level; possess specialized knowledge, skills, abilities, and experience; and exercise independent judgment in the performance of their duties. Advanced journey-level classes may, and oftentimes do, provide full, first-line supervision or technical, functional, or lead supervision over lower-level positions.

### **Principal/Manager**

Principal-level and manager classes provide extraordinary expertise in a specialized area that is critical to the mission of the organization. An incumbent in this class typically independently represents the organization; is a subject-matter expert who possesses highly specialized knowledge, skills, abilities, and experience; and is responsible for a specialty that has a major impact on the organization. Principal-level classes may or may not directly supervise subordinates; manager classes supervise subordinate staff.

### **Director**

Director classes recognize positions with responsibility for major organizational areas. This level coordinates the implementation of policy and programs among assigned tasks and functional teams.

### **Executive Director**

The executive director is the highest-level class and has full responsibility for the direction and administration of the organization.

## **CLASSIFICATION SERIES**

A classification series is a set of two or more classes within a job family that are closely related in terms of work performed and distinguished primarily by the level of responsibility and scope of duties assumed. Within a class series, it is possible to distinguish general categories or levels based upon factors such as scope of responsibility assumed, the training and experience required to perform assigned duties, and the nature of supervision received and exercised. Also, common titling designations are generally used to clearly define the applicable class levels.

### **Administrative Support Classes**

The following subsections indicate for each of the defined class levels in the office support class series the titling distinctions, the scope of duties assumed, the general experience and training required, and the nature of the supervision received and exercised that typically reflect each level.

#### Entry Level ("I" Classes)

Entry-level or trainee classes provide on-the-job training to employees with limited related work experience. Assignments are generally limited in scope and are performed within a procedural framework established by higher-level employees. As experience is acquired, the employee performs with less immediate supervision.

#### Journey Level ("I," "II" or "No Designation" Classes)

Journey-level classes recognize positions that require the incumbent to work under general supervision and within a framework of established procedures. Incumbents are expected to perform the full range of duties with only occasional instruction or assistance. Positions at this level frequently work outside the immediate proximity of a supervisor. A journey-level position is fully trained in the scope of duties associated with this level and work is normally reviewed only on completion and for overall results.

#### Advanced Journey/Supervisory Level ("II," or "III" Classes)

Advanced journey/supervisory-level classes recognize positions that perform a full range of duties, possess special technical or function expertise, and are assigned specialized duties. They typically are assigned significant responsibilities above the journey level that require specialized knowledge, skills, abilities, and experience, and exercise independent judgment in the performance of their duties. Advanced journey/supervisory-level positions may, and oftentimes do, exercise direct supervision or technical, functional, or lead supervision over lower-level positions.

## Professional Class Series

As with the office support job families, professional job families may contain classes at the entry-level through advanced journey-level. Distinctions in levels in professional class series parallel those for other job families, but they differ in some respects in scope of duties, supervision, and titling designations, as the following subsections indicate.

### Trainee Level ("Junior" or "I" Classes)

Trainee classes provide formal training to employees with limited related work experience. This position is generally short-term because once the employee finishes the formal training program, s/he moves into an entry-level position in the related class series.

### Entry Level ("I," "II," or "Assistant" Classes)

The entry-level classes in the professional class series are designed to provide a continuing on-the-job training opportunity to incumbents. This level recognizes the longer learning curve inherent in professional positions and provides incumbents with an opportunity to assume increasing levels of responsibility. Incumbents at this level are expected to perform the less complex work with complete independence and assume increasingly complex tasks associated with the full journey level. They may be expected to provide indirect supervision to clerical or technical staff. Less complex work is normally reviewed only on completion, while more complex tasks are performed under direct supervision.

### Journey Level ("II," "Associate," or "No Designation" Classes)

Journey-level professional classes pertain to positions that perform a full range of tasks and work under direction within a framework of established procedures. At this level, incumbents work with only occasional instruction or assistance. They may be expected to provide direct supervision to subordinate clerical or technical staff and indirect supervision to other professional staff. Work is normally reviewed only on completion and for overall results.

### Advanced Journey/Supervisory Level ("Senior" Classes)

Advanced journey/supervisory-level professional classes may be established to recognize positions assigned significant responsibility above the journey level, or positions possessing specialized skills and experience. Positions at this level perform work requiring significant independent judgment. They typically assume responsibility for an organizational unit and may, and oftentimes do, exercise direct supervision over professional, technical, and clerical staff.

## **FLEXIBLE STAFFING**

Flexible staffing allows the Executive Director to internally promote employees within a class series containing trainee-level, entry-level, journey-level and—in some cases as defined below—advanced journey/supervisory-level positions without advertising the position to other applicants. It also allows the flexibility to hire employees at the trainee, entry, journey, or advance journey/supervisory level dependent upon applicant qualifications and staffing needs and place them on a logical career ladder.

After gaining the experience and knowledge to perform the full range of journey-level tasks, and fulfilling any special requirements for the journey level, an entry-level employee could reasonably expect to progress to the journey level based upon the judgment of management. Flexible staffing does not mean that every employee can expect to advance through all the levels: in all cases, advancement is dependent on job performance, the complexity of duties and the needs of the agency. Agency needs include the need to maintain a balanced budget.

The availability of the flexible staffing option does not preclude the Executive Director from choosing to determine advancement through a competitive selection method.

The following classifications are authorized for flexible staffing:

- Accountant I/II/III
- Administrative Assistant I/II/III/Administrative Coordinator I/II/Clerk of the Board
- Administrative Clerk I/II/III
- Assistant Research Analyst/Associate Research Analyst/Senior Research Analyst/\_Supervising Senior Research Analyst
- Graphic Designer I/II/Associate Graphic Designer/Senior Graphic Designer
- Information Technology Analyst I/II/Associate IT Analyst/Senior IT Analyst
- Junior Planner/Assistant Planner/Associate Planner/Senior Planner/Supervising Senior Planner

## **CLASS SPECIFICATION FORMAT**

The class specifications for the proposed job classes as outlined in this report are descriptive and explanatory in defining classes. Each class specification may contain all or part of the following information:

### **Class Title**

The class title is a brief and descriptive designation of the type of work performed. The class title on payrolls, budgets, personnel reports, and other official forms and reports will provide a common reference to the position. It should be understood that the class title is selected to serve this purpose and is not to be construed as limiting the use of working titles.

### **Definition**

This section is a general description of the work and includes a brief, concise definition of the primary responsibilities assigned to positions in the class.

### **Distinguishing Characteristics**

This section, when used, describes the level of work in relation to higher or lower classes in the same series.

### **Supervision Received and Exercised**

This section describes the level of supervision received and exercised by positions in the class. For a definition of the terms used to denote levels of supervision, see the next part of this section.

### **Examples of Duties**

This section is intended to enable the reader to obtain a more complete concept of the actual work performed in positions allocated to this class. It lists typical tasks that are common to positions of the class. These examples show the range of duties performed by employees in the class. The list is descriptive, but not limiting. It is not intended to describe all the work performed in all positions allocated to the class. This section merely serves to illustrate the more typical portions of the work. The statement "Performs related duties as required" is included in all class specifications to provide flexibility to management in assigned duties.

## Minimum Qualifications

This section lists the knowledge and abilities that the duties of the class require and that applicants for positions in the class must possess at a minimum to be qualified. Also included are the desirable levels of experience and education or training most likely to produce the desired knowledge and abilities. It should be stressed that this section does not in any way refer to the qualifications of present employees. Personal characteristics commonly required of all employees, such as honesty, industry, and freedom from habitual use of intoxicating beverages or drug addiction, are not listed since they are implied as required qualifications for all classes. The experience and education standards may be useful in the development of recruitment and selection approaches, but they are intended as guidelines only and should not be construed as minimum requirements. The provided experience and education statements are written as a middle ground to evaluate candidate qualifications. For example, any individual may have more education and less experience than the guidelines describe and still be qualified for the position. Therefore, the statement above the experience and education guidelines reads, "Any combination of experience and education or training that would likely provide the required knowledge and abilities is qualifying."

## Licenses or Certificates

In certain classifications, legal or special provisions require possession of a specific license or certification issued by a Board of Licensure as a condition of employment or continued employment.

## CLASS SPECIFICATION FORMAT

### CLASS TITLE

#### DEFINITION

#### DISTINGUISHING CHARACTERISTICS

#### EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

#### MINIMUM QUALIFICATIONS

Knowledge of:

Ability to:

Experience and Training:

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

License or Certificate:

## **DEFINITIONS OF LEVELS OF SUPERVISION**

The following terms may be used to denote the levels of supervision received and exercised by positions in the various classes of work:

### **Direct Supervision**

The basic characteristics of direct supervision are the assignment of tasks; the observance, review, and evaluation of performance; the administration of line personnel functions (e.g., selection, discipline, grievances, privileges); and responsibility for the worker, as well as the work. The gradations of direct supervision are described below in terms of supervision received by employees.

#### **Immediate Supervision**

The employee works in the presence of his/her supervisor or in a situation of close control and easy reference. Work assignments are given with explicit instructions or are so routine that few, if any, deviations from established practices are made without checking with the supervisor. This type of supervision generally is exercised over the entry level in a technical or clerical series and trainee level in a professional series.

#### **General Supervision**

Assigned duties require the exercise of judgment or choice among possible actions, sometimes without clear precedents and with concern for the consequences of the action. The employee may or may not work in proximity to his/her supervisor. This type of supervision typically pertains to the journey levels in a technical or clerical series and entry level in a professional series.

#### **Direction**

The employee receives general instructions regarding the scope of and approach to projects or assignments, but procedures and techniques are left to the discretion of the employee. This category is usually applied to journey-level professional positions and advanced journey-level technical and clerical positions in which employees are expected to operate with a reasonable degree of independence.

#### **General Direction**

The employee is responsible for a program or function and is expected to carry out necessary activities without direction except, as new or unusual circumstances require. This category is usually reserved for supervisory positions or section heads.

### Administrative Direction

The employee has broad management responsibility for a large program or set of related functions. Administrative direction is usually received in terms of goals; review is received in terms of results. This category is usually reserved for principals, managers and directors.

### Policy Direction

This is reserved for directors.

### **Indirect Supervision**

Indirect supervision is characterized by some form of authority over the work of employees not under direct supervision. In other words, the "supervisor" who provides indirect supervision is responsible for the work, but not for the worker. The descriptions above were written in relation to the employee under direct supervision; the following subsections describe persons with responsibility for exercising indirect supervision.

#### Technical Supervision

The "supervisor" is responsible for prescribing procedures, methods, materials, and formats as a technical expert in a specialty. S/he may produce or approve specifications, guides, lists, or directions. S/he may give direction to employees, but usually on "how" and "why," and does not assign tasks or observe and evaluate performance. Technical supervision is related to an occupational specialty or function, not to specified employees.

#### Functional Supervision

The "supervisor" is responsible for a project or recurrent activities that involve tasks performed by persons over whom s/he has authority to give direction in regard to that project or activity, even though they are under the direct supervision of someone else. Functional supervision may include technical supervision, but goes beyond it in that the supervisor schedules and assigns tasks, monitors progress, reviews results, evaluates the employee regarding the area of assignment, and is the person responsible for the completed work product.

## **ALLOCATION FACTORS**

Allocation factors are standards that are used to measure job requirements of individual positions. These factors can be compared in order to measure the similarities and differences among positions. The allocation factors used to develop SACOG's classification plan are:

### **Allocation Factors**

Decision-Making

Scope and Complexity

Contact with Others Required by the Job

Supervision Exercised and Received

Knowledge, Skills, and Abilities

These allocation factors are carefully and consistently applied during the analysis of each position included in the study. They are then compared with the same elements in positions that involve similar kinds of work. Not all factors will be as pertinent to all positions, and each factor is analyzed in accordance with the importance of that particular factor to the type of job under study.

Consideration of these allocation factors leads to the identification of various classes. More specifically, positions are typically divided first into classification families and series that involve the same kind of work, and then subdivided into classes based on levels of responsibility within each group.

Positions are classified according to the nature and kind of duties assigned to the position. The assignment of additional duties of a similar nature to a position does not justify a higher classification. Problems of excessive workload are properly solved by redistributing work or adding employees, not by reclassifying existing positions.

The allocation factors are briefly defined below:

### **Decision-Making**

Decision-making consists of (a) the decision making responsibility and degree of independence or latitude that is inherent in the position, and (b) the impact of the decisions.

### **Scope and Complexity**

Scope and complexity define the breadth and difficulty of the assigned function or program responsibility inherent in the classification.

### **Contact with Others Required by the Job**

This allocation factor measures (a) the types of contacts, and (b) the purpose of the contacts.

### **Supervision Exercised and Received**

This allocation factor describes the level of supervision received from others and the nature of supervision provided to other workers. It relates to the independence of action inherent in a position.

### **Knowledge, Skills, and Abilities**

This allocation factor defines the knowledge, skills, and abilities necessary to perform assigned responsibilities.

## SECTION III — CLASSIFICATION PLAN

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This section of the report presents the classification plan for SACOG's positions. This classification plan was designed using the classification framework and concepts presented above.

The presentation of the classification plan included the following:

Classification List

Allocation of Positions to Classes

Class Specifications

**CLASSIFICATION LIST**

The approved classification plan includes the following class series and classifications:

<b>Class</b>	<b>Salary Range</b>
<b><u>Accounting Classes</u></b>	
Accounting Technician	20
Accountant I	22
Accountant II	26
Accountant III	29
Senior Accountant	32
<b><u>Administrative Classes</u></b>	
Administrative Clerk I	14
Administrative Clerk II	16
Administrative Clerk III	18
Administrative Assistant I	20
Administrative Assistant II	22
Administrative Assistant III	25
Administrative Coordinator I	25
Administrative Coordinator II	27
Clerk of the Board	29
<b><u>Communications Classes</u></b>	
Graphic Designer I	22
Graphic Designer II	26
Associate Graphic Designer	29
Senior Graphic Designer	32
Public Information Coordinator I	22
Public Information Coordinator II	26
Associate Public Information Coordinator	29
Senior Public Information Coordinator	32
<b><u>Executive Classes</u></b>	
Directors	N/A
Executive Director	N/A

<b>Class</b>	<b>Salary Range</b>
<b><u>Information Technology Classes</u></b>	
Information Technology Analyst I	22
Information Technology Analyst II	26
Associate Information Technology Analyst	29
Senior Information Technology Analyst	32
<b><u>Management Classes</u></b>	
Managers	N/A
Principal Program Expert	N/A
<b><u>Planning Classes</u></b>	
Junior Planner	23
Assistant Planner	26
Associate Planner	29
Senior Planner	32
Supervising Senior Planner	33
<b><u>Research Analyst Classes</u></b>	
Research Technician	22
Assistant Research Analyst	26
Associate Research Analyst	29
Senior Research Analyst	32
Supervising Senior Research Analyst	33
<b><u>Other Classes</u></b>	
Staff Assistant	14
Student Intern	*

\*Student interns have a separate hourly wage schedule.

## **CLASS SPECIFICATIONS**

These specifications are written to be general descriptions of the main focus of the assigned duties and responsibilities and are not inclusive of every task assigned to a position. For a general explanation of the format of the class specifications, refer to Section II of this report.

## ACCOUNTING CLASSES

### **ACCOUNTING TECHNICIAN**

#### DEFINITION

To perform paraprofessional, technical, and clerical accounting duties in the preparation, maintenance, review and processing of financial and statistical records, reports and claims.

#### DISTINGUISHING CHARACTERISTICS

This is a paraprofessional class that performs technical and clerical accounting duties. It is distinguished from the classes in the professional Accounting series in that an Accounting Technician performs duties that are generally limited in scope and within the design and procedural framework established by higher-level employees. Incumbents in this class assist professional accountants in a variety of paraprofessional accounting work involved in preparing, maintaining and reviewing financial and statistical records and reports.

#### SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from a Senior Accountant or another supervisory position.

#### EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but not limited to, the following:

- Provides technical, paraprofessional assistance to professional accountants.
- Maintains records of financial data; checks data for accuracy.
- Audits claims and vouchers for accuracy, budget classification, discounts, legality, propriety and compliance with SACOG procedures and contracts according to established guidelines.
- Checks claims, vouchers and purchase orders for fraudulent or improper authorization and other discrepancies.
- Assembles materials for and prepares financial and statistical documents, reports, accounts payable, requisitions vouchers, purchase orders, bills, checks and other forms.
- Prepares and maintains payroll records and transaction reports.
- Assists in preparation of payroll.
- Prepares and makes bank deposits.
- Assists in preparing financial statements.
- Prepares journal entries.
- Creates spreadsheets and databases to track and access information.
- Answers accounting-related questions from SACOG staff, public agencies, contractors, and others.
- Performs related duties as assigned.

## **MINIMUM QUALIFICATIONS**

### **Knowledge of:**

- Methods, practices and terminology used in financial record keeping work and statistical clerical work.
- Modern office methods, practices, procedures, and computer equipment.
- Basic accounting principles and practices.
- Computer applications, including spreadsheets, databases and word processing programs.

### **Ability to:**

- Perform paraprofessional accounting work involving the use of independent judgment.
- Make arithmetic calculations accurately and rapidly.
- Prepare financial and statistical reports in accordance with predetermined requirements.
- Maintain journals, ledgers, and file systems.
- Interpret, apply and explain laws, regulations, rules, policies and procedures.
- Write English at a level necessary to compose clear and concise reports, procedures manuals, and correspondence.
- Type accurate financial and tabular data.
- Communicate clearly and concisely, both orally and in writing.
- Understand and carry out oral and written directions.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Operate computers, adding machines, calculators, typewriters and related office equipment.

### **Experience and Training:**

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

#### **Experience:**

Two years of accounting clerical experience that involved preparing and maintaining accounting records.

#### **Training:**

Equivalent to completion of the twelfth grade, supplemented by course work in bookkeeping, accounting, and business.

Related college course work may substitute for the experience requirement on a year-for-year basis.

**ACCOUNTANT I  
ACCOUNTANT II  
ACCOUNTANT III**

**DEFINITION**

To perform a wide variety of professional accounting and fiscal duties, such as establishing and maintaining accounting records, reviewing and analyzing accounting and financial transaction records, preparing financial statements and reports, and participating in budget preparation and control.

**DISTINGUISHING CHARACTERISTICS**

**Accountant I**

This is the entry-level class in the professional Accounting series. This class is distinguished from the Accountant II by the performance of the more routine professional tasks and duties normally assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters related to established procedures and guidelines as are positions allocated to the II level.

**Accountant II**

This is the journey-level class in the professional Accounting series. This class is distinguished from the Accountant I level by the performance of the more varied and complex professional duties. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and they are fully aware of the operating procedures and policies with the work unit. Advancement to the Accountant II level requires that the employee be performing most of the duties of the class. Positions in this class are flexibly staffed and may be filled by advancement from the I level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the entry-level class.

**Accountant III**

This is the advanced journey-level class in the professional Accounting series. This class is distinguished from the Accountant II level by the assignment of the full range of professional duties. Employees at this level operate with a high degree of independence. Advancement to the Accountant III level requires that the employee be performing or capable of performing the full range of the duties for the class. Positions in this class are flexibly staffed and may be filled by advancement from the Accountant II level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the journey-level class.

## SUPERVISION RECEIVED AND EXERCISED

### Accountant I

Receives general supervision from the Senior Accountant or another supervisory position.

### Accountant II

Receives direction from the Senior Accountant or another supervisory position.

### Accountant III

Receives direction from the Senior Accountant or another supervisory position. May provide technical and functional direction to subordinate accounting positions.

## EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but not limited to, the following:

- Maintains records of financial data; assembles data from appropriate sources and prepares financial statements, summaries and reports requiring analysis of data; checks data for accuracy.
- Assembles materials for and prepares financial and statistical documents, reports, accounts payable, purchase orders, and other forms.
- Prepares and maintains payroll records and transaction records.
- Checks claims, vouchers and purchase orders for fraudulent or improper authorization and other discrepancies; resolves discrepancies where interpretation of guidelines, data or procedures is necessary.
- Maintains central accounts for fixed assets and inventory accounts.
- Prepares periodic reports of income statements and balance sheets; assists in developing and maintaining general subsidiary ledgers; assists in the preparation of quarterly financial statements.
- Participates in the review and audit of SACOG's accounts and records.
- Prepares and makes bank deposits.
- Maintains financial records and control of capital projects; insures timely submission of payment request and receipt of funds.
- Reviews billing, check writing, and payroll for accuracy.
- Researches, recommends, and implements software, as needed; implements software in accounting systems; enters data in the computer; and operates a computer.
- Maintains fixed asset database, including depreciation, replacement costs, insurance values and fixed asset replacement funds.

- Maintains and reviews deferred compensation schedules and reconciles schedules to the Plan Administrator's reports.
- Answers accounting-related questions from SACOG staff, public agencies, contractors, and others.
- Assist in the preparation of annual budgets by analyzing revenue by source, preparing financial budgetary and other budget detail in cooperation with program staff.
- Prepares or assists in the preparation of annual and interim financial reports.
- Audits claims and vouchers for accuracy, budget classification, discounts, legality, propriety and compliance with SACOG procedures and contracts according to established guidelines.
- Prepares finance and project cost reports; prepares financial statement analyses and special reports.
- Participates in the design, control, operation, and enhancement of manual and computerized systems, including budget control, general ledger control, contracts, accounts payable, revenue, billing, payroll, project accounting, and fixed assets.
- Prepares or reviews journal entries; analyzes, maintains and balances general ledger accounts, including supporting schedules and documentation for audit; reconciles details of all major general ledger accounts to proper control totals.
- Ensures that SACOG complies with and adheres to GASB pronouncements.
- Represents the department to visiting State and Federal and other outside auditors, to answer questions and provide accounting records and statements.
- Demonstrates continuous effort to improve operations, decrease turnaround times, streamline work processes, and work cooperatively and jointly to provide quality seamless customer service.
- Understanding of complex grant accounting functions including compliance requirements.
- Preparation of annual budget and financial statements for review by management and auditors.
- Performs related duties as assigned.

## **MINIMUM QUALIFICATIONS**

### **Accountant I**

#### **Knowledge of:**

- Methods, practices and terminology used in financial record keeping and statistics.
- Modern office methods, practices, procedures and computer equipment.
- English grammar, punctuation, spelling and usage.

#### **Ability to:**

- Make arithmetic calculations accurately and rapidly.
- Communicate clearly and concisely, both orally and in writing.
- Understand and carry out oral and written directions.
- Establish and maintain effective working relationships with those contacted in the course of work.

- Operate adding machines, calculators, typewriters and related office equipment.
- Operate a personal computer and use accounting-related software.

**Experience and Training:**

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

**Experience:**

No experience is required.

**Training:**

Equivalent to a bachelor's degree from an accredited college or university with major course work in accounting, business administration or a related field.

Experience as an Accounting Technician with SACOG may substitute for the training requirement on a year-for-year basis.

**Accountant II**

In addition to the qualifications of the Accountant I:

**Knowledge of:**

- Maintain journals, ledgers and file systems.
- Pertinent laws, rules and regulations pertaining to public agency accounting and financial record keeping activities.
- Professional accounting standards, such as generally accepted accounting principles (GAAP).

**Ability to:**

- Apply general accounting principles.
- Analyze and verify statements and schedules.
- Coordinate moderately complex accounting projects.
- Communicate effectively on the telephone and in person on technical subjects with SACOG staff, public agencies, contractors and the public.
- Work under time constraints and general supervision.
- Prepare and analyze statistical and financial data.
- Analyze laws, regulations and technical materials to determine impact on accounting functions; propose solutions and procedures.

**Experience and Training:**

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

**Experience:**

Two years of increasingly responsible professional accounting experience.

**Accountant III**

In addition to the qualifications of the Accountant II:

**Knowledge of:**

- Professional accounting standards, such as generally accepted auditing standards (GAAS).
- Governmental accounting and budgetary record keeping.

**Ability to:**

- Evaluate and implement employee benefit programs.
- Analyze situations accurately and adopt effective courses of action.
- Coordinate complex accounting projects.
- Read and interpret complex reports, requests and legal forms.
- Perform difficult and complex statistical and record keeping work involving the use of considerable independent judgment
- Prepare clear and concise financial statistical statements and reports.
- Interpret and apply accounting and auditing principles and procedures applicable to government agencies.

**Experience and Training:**

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

**Experience:**

Three years of increasingly responsible professional accounting experience.

## SENIOR ACCOUNTANT

### DEFINITION

To supervise and perform professional accounting duties involving the analysis, maintenance and verification of fiscal records; to provide instruction and assistance to administrators in understanding and complying with the fiscal reporting requirements of Federal, State and local programs; assists in developing and maintaining SACOG's budget.

### DISTINGUISHING CHARACTERISTICS

This is the supervisory class within the Accounting series. Positions allocated to this class are distinguished from the Accountant III in that the Senior Accountant supervises a staff of professional accountants and by the assignment of higher-level responsibilities that require additional training and experience, including possession of a Certified Public Accountant certificate.

### SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the Director of Finance or another management position.

Exercises supervision over assigned professional and technical accounting personnel.

### EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Supervises professional, technical and clerical accounting staff.
- Advises and assists administrators in budget development and control; compiles and presents financial and statistical summaries.
- Supervises and participates in analyzing cash flow, monitoring approved budgets and working with administrators to ensure that expenditures are within budget and cash flow constraints.
- Analyzes grant-funded program financial reporting and cash management requirements; assists administrators in the completion of grant applications; prepares and submits reports on the financial status of grant-funded programs.
- Conducts and monitors financial audits of agencies receiving money through SACOG to determine compliance with fiscal requirements; interprets and evaluates financial reporting requirements.
- Prepares special financial and statistical reports resulting from the conduct of financial studies and analyses.
- Reviews, evaluates and interprets contracts relating to Federal and State projects in order to advise and assist management in meeting financial reporting requirements.
- Assists personnel in establishing financial record keeping systems through the application of sound accounting techniques.
- Selects, evaluates, trains and disciplines assigned personnel.

- Coordinates SACOG's annual audit and Transportation Development Act audits; assists outside auditors in their review and audit of the organization's accounts and records.
- Assists the Director of Finance with budget development, review, control and changes; analyzes monthly budget reports and makes recommendations regarding apparent budget issues.
- Supervises day-to-day accounting and bookkeeping operation, such as setting up and maintaining accounting books, classifying accounting transactions, posting, journalizing, taking trial balance, closing end-of-period adjustments and reconciling statements.
- Serves as liaison with other governmental agencies concerning accounting matters.
- Provides periodic reports to administrators and others on status of projects; periodically performs administrative follow-up on contracts and agreements and Federal and State mandated auditing and accounting requirements to assure compliance and timeliness of actions.
- Performs related duties as assigned.

### **MINIMUM QUALIFICATIONS**

#### **Knowledge of:**

- Principles and practices of supervision, training and evaluation.
- Pertinent laws, rules and regulations pertaining to public agency accounting and financial record keeping activities.
- Professional accounting standards, such as generally accepted auditing standards (GAAS) and generally accepted accounting principles (GAAP).
- Methods, practices and terminology used in financial record keeping and statistics.
- Modern office methods, practices and procedures
- Computer equipment and accounting software.
- Professional accounting principles and practices.
- Governmental accounting and budgetary record keeping.
- English grammar, punctuation, spelling and usage.

#### **Ability to:**

- Perform difficult and complex statistical and record keeping work involving the use of considerable independent judgment and requiring speed and accuracy.
- Analyze situations accurately and adopt effective courses of action.
- Prepare clear and concise financial statistical statements and reports.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Interpret and apply accounting and auditing principles and procedures applicable to joint powers agencies.
- Interpret and administer accounting policies and procedures.

- Direct, review and ensure the accuracy of the work of assigned clerical, technical and professional accounting staff.

**Experience and Training:**

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

**Experience:**

Four years of increasingly responsible professional accounting experience, preferably including some governmental accounting and supervisory experience.

**Training:**

Equivalent to a bachelor's degree from an accredited college or university with major course work in accounting, business administration or a related field.

**License or Certificate:**

Certified Public Accountant certificate.

## ADMINISTRATIVE CLASSES

### ADMINISTRATIVE CLERK I ADMINISTRATIVE CLERK II ADMINISTRATIVE CLERK III

#### DEFINITION

To perform a wide variety of general or specialized clerical duties related to the function or section to which assigned; to assist in the collection, compilation, maintenance and dissemination of a variety of information and data; and to respond to requests for information.

#### DISTINGUISHING CHARACTERISTICS

##### Administrative Clerk I

This is the entry-level class in the Administrative Clerk series. This class is distinguished from the Administrative Clerk II by the performance of the more routine tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters related to established procedures and guidelines as are positions allocated to the Administrative Clerk II level. This class is flexibly staffed with Administrative Clerk II; however, some positions will remain at this level, including the receptionist position and other positions that perform simple, routine clerical duties.

##### Administrative Clerk II

This is the full journey-level class within the Administrative Clerk series. This class is distinguished from the Administrative Clerk I by the complexity and variety of duties assigned. Employees at this level receive only occasional instructions or assistance as new or unusual situations arise and they are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and may be filled by advancement from the Administrative Clerk I level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the entry-level class.

##### Administrative Clerk III

This is the advanced journey-level class in the Administrative Clerk series. This class is distinguished from Administrative Clerk II level by the range, difficulty and complexity of work performed and the exercise of a significant degree of independent judgment and responsibility. Positions in this class are flexibly staffed and may be filled by advancement from the Administrative Clerk II level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the journey-level class.

#### SUPERVISION RECEIVED AND EXERCISED

##### Administrative Clerk I

Receives immediate supervision from a supervisory position.

### Administrative Clerk II

Receives general supervision from a supervisory position.

### Administrative Clerk III

Receives direction from a supervisory position.

### EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Receives telephone calls to the SACOG offices; determines correct extensions and routes calls; takes and relays messages.
- Greets visitors to the SACOG offices and directs visitors to offices and personnel requested.
- Responds to general questions and provides available information.
- Screens phone calls and visitors; receives complaints and requests, and handles or routes them for necessary action.
- Types, prepares, proofreads and processes a variety of documents, including general correspondence, memos, Board items and statistical charts from rough draft or verbal instruction.
- Requests bids for office equipment when needed to replace outdated equipment, for example: copier machines, postage machines, fax machines.
- Assists with maintaining agency's phone system, including switching extensions, replacing and repairing telephones when needed, and requesting service calls.
- Assists with maintaining Board room sound system, including requesting bids when upgrades are needed and placing service calls if necessary.
- Mails out Board and Committee packets to Board members.
- Coordinates the maintenance of the agency's vehicle fleet
- Provides secretarial assistance to committees or boards by assembling the agenda and background materials, and taking and preparing meeting minutes.
- Assists in coding and tabulating data for input into a data processing system; enters data into computer; verifies output and resolves discrepancies.
- Collects and assembles data and background materials for a variety of narrative, financial or statistical reports.
- Reviews and allocates data into geographic zones.
- Maintains a variety of statistical records; checks and tabulates statistical data; prepares simple statistical reports.
- Maintains sign-out sheets, vehicle request forms, car keys, and conference room reservation books.
- Composes routine correspondence related to responsibilities assigned.
- Receives, sorts and distributes mail; acts as a courier.
- Performs a wide variety of general clerical work including filing, checking and recording information and photocopying material.
- Performs record keeping for various funds and expenditures.

- Creates files and filing systems; files documents; searches, locates, retrieves and tracks files.
- Operates a variety of office equipment, including an adding machine, personal computer, typewriter, microfilmer, fax, tape recorder and copy machine.
- Compiles reports on survey data; develops data entry screens for tracking surveys; enters survey and application data into a database or spreadsheet.
- Collects, codes, enters and verifies data from a variety of sources; performs non-technical, routine review of data for legibility, orderliness and format.
- Updates and maintains the address list and label system; researches addresses and proofs for correctness; prepares mailing labels as necessary.
- Receives cash and issues receipts for materials and supplies sold; forwards cash and receipts to the business office.
- Performs related duties as assigned.

## **MINIMUM QUALIFICATIONS**

### **Administrative Clerk I**

#### **Knowledge of:**

- English usage, spelling, grammar and punctuation.
- Modern office procedures, methods and equipment.

#### **Ability to:**

- Learn office methods, rules and policies.
- Answer the telephone clearly, politely and correctly.
- Deal tactfully and courteously with customers and the general public.
- Understand and follow oral and written instructions.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Operate computers and other office equipment.
- Perform repetitive tasks with accuracy.
- Communicate clearly and concisely, both orally and in writing.
- Basic English usage, spelling, grammar, spelling and punctuation.
- Make basic arithmetic calculations accurately.

#### **Experience and Training:**

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

**Experience:**

No experience required.

**Training:**

Equivalent to the completion of the twelfth grade.

**License or Certificate:**

Possession of a valid California driver's license may be required for some assignments. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

**Administrative Clerk II**

In addition to the qualifications for Administrative Clerk I:

**Knowledge of:**

- Computer applications, including word processing, spreadsheet and database software.
- Filing, indexing, cross-referencing and records management.
- Phone systems, sound systems, and copy machines

**Ability to:**

- Prepare reports, letters, memos and other documents.
- Photocopy and assemble large Committee and Board agenda packets quickly and accurately.

**Experience and Training:**

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

**Experience:**

One year of experience performing general clerical duties, including customer service, filing, copying, and document preparation.

**Administrative Clerk III**

In addition to the qualifications for Administrative Clerk II:

**Knowledge of:**

- Record keeping principles and procedures.
- Word processing, database, and spreadsheet computer applications.

**Ability to:**

- Accurately and efficiently perform data entry activities.
- Compile and maintain complex and extensive records and files.
- Lead less experienced personnel in assignments.

**Experience and Training:**

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

**Experience:**

Three years of experience performing increasingly responsible general clerical duties.

**ADMINISTRATIVE ASSISTANT I  
ADMINISTRATIVE ASSISTANT II  
ADMINISTRATIVE ASSISTANT III**

**DEFINITION**

To perform a wide variety of secretarial, administrative and general clerical duties for a director or the Executive Director; or perform highly complex and confidential clerical duties for a specialized unit or function.

**DISTINGUISHING CHARACTERISTICS**

**Administrative Assistant I**

This is the entry-level class in the Administrative Assistant series. This class is distinguished from the Administrative Assistant II by the performance of the more routine tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters related to established procedures and guidelines as are positions allocated to the Administrative Assistant II level. Positions in this class are flexibly staffed and may be filled by advancement from the Administrative Clerk I level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the entry-level class.

**Administrative Assistant II**

This is the full journey-level class within the Administrative Assistant series. This class is distinguished from the Administrative Assistant I by responsibility for performing highly responsible, sensitive, and complex administrative and secretarial duties for the Executive Director, for two or more directors, or for the specialized program to which assigned. This class may supervise assigned clerical staff. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and they are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and may be filled by advancement from the Administrative Assistant I level. In some cases, depending upon the complexity of duties, job performance and the needs of the agency, an employee may remain classified at the Administrative Assistant I level.

**Administrative Assistant III**

This is the supervisory-level class within the Administrative Assistant series. This class is distinguished from the Administrative Assistant II by responsibility for directly supervising the agency's clerical staff. Positions in this class are flexibly staffed and may be filled by advancement from the Administrative Assistant II level. In some cases, depending upon the complexity of duties, job performance and the needs of the agency, an employee may remain classified at the Administrative Assistant II level.

## SUPERVISION RECEIVED AND EXERCISED

### Administrative Assistant I

Receives immediate or general supervision from a supervisory position.

### Administrative Assistant II

Receives general supervision from a supervisory position.

May exercise direct or technical and functional supervision over subordinate clerical positions.

### Administrative Assistant III

Receives direction from a director or other management position.

Exercises direct supervision over subordinate clerical positions.

## EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Provides administrative support to management and other staff; makes appointments, schedules meetings and maintains calendars.
- Screens phone calls and visitors; receives complaints and requests, and handles or routes them for necessary action.
- Types, proofreads and processes a variety of documents, including general correspondence, memos and statistical charts from rough draft or verbal instruction.
- Responds to routine correspondence by composing short letters, using form letters or making telephone calls.
- Locates, compiles and summarizes data for special projects and various reports.
- Initiates and maintains a variety of files and records for information; maintains manuals and updates resource materials.
- Maintains inventory of necessary forms and supplies.
- Provides secretarial assistance to committees or boards by assembling the agenda and background materials, and taking and preparing meeting minutes.
- Conducts and coordinates special projects for the agency.
- Explains and interprets SACOG policies, rules and regulations in response to inquiries; refers inquiries as appropriate.
- Makes travel arrangements; maintains appointment schedules and calendars; arranges meetings and conferences.
- Provides administrative support to members of the executive staff, Chair of the Board or the Executive Director.
- Assists in performing the duties of Clerk to the Board of Directors; gathers background information and prepares and distributes agendas and notices of meetings.

- Screens Executive Director's incoming mail; segregates correspondence requiring immediate attention; brings to Director's attention for action; directs mail to appropriate sections.
- Independently responds to letters and correspondence not requiring direct attention of other staff.
- Assists in planning and coordinating recruitment of staff and procurement of contractual assistance.
- Maintains confidential files.
- Explains policies and procedures to staff.
- Supervises, trains and evaluates assigned clerical personnel; assigns and participates in the work of assigned clerical personnel; plans and prioritizes workflow; evaluates methods and procedures.
- Acts as system administrator for word processing software, which includes file management, providing ongoing consultation and training to SACOG staff and analyzing and resolving problems.
- Develops computer-generated forms, styles, and procedures to ensure a high degree of professionalism.
- Compiles expense reports for executive staff
- Acts as Deputy Clerk of the Board.
- Performs related duties as assigned.

## **MINIMUM QUALIFICATIONS**

### **Administrative Assistant I**

#### **Knowledge of:**

- English usage, spelling, grammar and punctuation.
- Modern office methods, procedures and equipment including computer software as required by the position to which assigned.
- Computer applications, including word processing, spreadsheet and database software.

#### **Ability to:**

- Operate a personal computer and other modern office equipment.
- Communicate clearly and concisely, both orally and in writing.
- Understand and follow oral and written instructions.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Attend meetings and provide accurate minutes.

**Experience and Training:**

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

**Experience:**

Two years of increasingly responsible clerical experience, preferably including one year as a secretary or administrative assistant for a manager.

**Training:**

Equivalent to completion of the twelfth grade.

**License or Certificate:**

Possession of a valid California driver's license may be required for some assignments. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

**Administrative Assistant II**

In addition to the qualifications for Administrative Assistant I:

**Knowledge of:**

- Organization, procedures and operating details of SACOG.
- Business letter and memo writing.
- Record keeping principles and procedures.
- Advanced word processing and database methods.
- Advanced note-taking and minute composition.
- Procedures and programs related to assigned area of responsibility.

**Ability to:**

- Clarify, interpret and apply policies, laws and rules.
- Analyze situations carefully and adopt effective courses of action.
- Compile information and maintain complex and extensive records.
- Compose correspondence and forms independently.
- Interpret and apply administrative rules, procedures, and SACOG policies.
- Train and consult regarding word processing programs and agency procedures.
- Maintain confidential data and information.

**Experience and Training:**

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

**Experience:**

Three years of increasingly responsible clerical experience, including two years as a secretary or administrative assistant for a manager.

**Training:**

Equivalent to the completion of the twelfth grade.

**Administrative Assistant III**

In addition to the qualifications for Administrative Assistant II:

**Knowledge of:**

- Principles and practices of supervision, training, and evaluation.
- Principles, practices, methods, and techniques used in advanced word processing and database applications.

**Ability to:**

- Supervise, train, and evaluate assigned personnel.
- Assume independent responsibility for the maintenance and operation of the word processing and related systems.
- Maintain and coordinate the administrative support services of SACOG.

**Experience and Training:**

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

**Experience:**

Four years of increasingly responsible clerical experience, including two years as a secretary or administrative assistant for a manager.

## ADMINISTRATIVE COORDINATOR I ADMINISTRATIVE COORDINATOR II

### DEFINITION

To provide administrative and technical support consisting of highly complex and confidential duties for specialized units or functions.

### DISTINGUISHING CHARACTERISTICS

#### Administrative Coordinator I

This is the journey-level class within the Administrative Coordinator series. This series is distinguished from the Administrative Assistant series by responsibility for technical and administrative support rather than primarily clerical responsibilities. This class is distinguished from the Administrative Coordinator II level by the performance of less complex tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters related to established procedures and guidelines as are positions allocated to the Administrative Coordinator II level. Positions in this class are flexibly staffed and may be filled by advancement from the Administrative Assistant II class. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the Administrative Assistant II class.

#### Administrative Coordinator II

This is the advanced journey-level class within the Administrative Coordinator series. This class is distinguished from the Administrative Coordinator I level by the assignment of the full range of professional duties. Employees at this level operate with a high degree of independence. Advancement to the Administrative Coordinator II level requires that the employee be performing or capable of performing the full range of the duties for the class. Positions in this class are flexibly staffed and may be filled by advancement from the Administrative Coordinator I level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the journey-level class.

### SUPERVISION RECEIVED AND EXERCISED

Receives direction from a Director or another supervisory position.

### EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Assists in the preparation of requests for consultant proposals, in the evaluation of proposals, and in the preparation of contracts.
- Reviews reports for compliance with contract provisions.
- Reviews invoices for accuracy and consistency with progress reports and completed work, and recommends approval.

- Initiates and maintains a variety of files and records for information; maintains manuals and updates resource materials.
- Locates, compiles and summarizes data for special projects and various reports.
- Researches, evaluates and interprets policies and procedures.
- Assists in the preparation and maintenance of reports.
- Performs a wide variety of highly responsible, sensitive, confidential and complex administrative duties, and maintains technical and complex records.
- Conducts and coordinates special projects for SACOG.
- Performs related duties as assigned.

### **MINIMUM QUALIFICATIONS**

#### **Administrative Coordinator I**

In addition to the qualifications of the Administrative Assistant II:

##### **Knowledge of:**

- Methods and techniques used in advanced spreadsheet applications.
- Complex procedures and programs related to assigned area of responsibility.

##### **Ability to:**

- Accurately interpret and apply administrative rules, procedures, and SACOG policies.
- Compile and maintain complex and extensive records and files.

##### **Experience and Training:**

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

##### **Experience:**

Four years of increasingly responsible technical and administrative experience.

##### **Training:**

Completion of a vocational training program beyond the high school level; or completion of 30 semester units or 45-quarter units from an accredited college or university in a field related to assigned areas of responsibility.

#### **Administrative Coordinator II**

In addition to the qualifications of the Administrative Coordinator I:

**Knowledge of:**

- Principles and techniques of research and statistical analysis.
- Most current rules and regulations related to assigned areas of responsibility.
- Complex procedures and programs related to assigned area of responsibility.

**Ability to:**

- Accurately interpret and apply administrative rules, procedures, and SACOG policies.
- Compile and maintain complex and extensive records and files.
- Gather, compile and analyze technical and statistical data.
- Coordinate complex projects.

**Experience and Training:**

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

**Experience:**

Five years of increasingly responsible technical and administrative experience.

**Training:**

Equivalent to a Bachelor's degree from an accredited college or university with major course work in business, general management, government or a field related to assigned areas of responsibility.

## CLERK OF THE BOARD

### DEFINITION

To plan, organize, direct and manage the activities associated with the Clerk of the Board functions; acts as liaison between Board members and staff and public; provides highly complex assistance to the Board of Directors, the Executive Director and SACOG management team; official custodian of Board actions and filer of Fair Political Practices Commission forms.

### DISTINGUISHING CHARACTERISTICS

The Clerk of the Board position is in a series of its own distinguished from the Administrative Assistant series by the responsibility for having direct contact with elected officials and responsibility for all Clerk of the Board activities.

### SUPERVISION RECEIVED AND EXERCISED

Receives direction from the Executive Director and SACOG Board.

Exercises direct supervision over assigned clerical staff.

### EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Coordinates the activities associated with the Board of Directors including preparing agendas in accordance with Brown Act requirements and coordinating agenda items with management and staff; schedules agenda presentations with local jurisdictions and outside agencies.
- Oversees the preparation of the agenda packets ensuring a high level of quality is maintained and procedures are followed.
- Provides assistance in developing Board of Directors budget and monitors spending.
- Attends all Board of Directors meetings; prepares the official minutes of meetings and ensures all Board actions are signed and processed as needed; attends committee meetings, management staff meetings and others as requested.
- Executes or communicates details of Board actions; act as custodian of all documents and records pertinent to actions of the Board including resolutions and minutes.
- As official filer of the State Fair Political Practices Commission forms, ensures that statements of economic interest are filed by Board members and staff and that the procedures and guidelines set forth by the FPPC are followed.
- Provides a wide variety of highly responsible, sensitive, confidential and complex administrative support to the Board members, the Executive Director and management staff; researches and prepares technical and administrative reports.
- Coordinates travel arrangements and meeting schedules for Board members.
- Supervises, trains and evaluates Executive Director Secretary and provides backup.
- Provides occasional human resources assistance to executive staff as needed.
- Acts as system administrator for word processing software, including file management, providing ongoing consultant and training to staff and analyzing and resolving problems; develops templates to ensure proper style and format.

## **MINIMUM QUALIFICATIONS**

### **Knowledge of:**

- FPPC guidelines and procedures; the Brown Act requirements; principles and practices of records management especially as related to public information and legal documents.
- Responsibilities, functions and operating procedures of SACOG.
- Preparation of agendas, agenda items and minutes; and the format and legal requirements used in preparation of agendas and resolutions.
- Principles and practices of supervision, training and evaluation.
- Principles and practices of modern office procedures; English usage, spelling, grammar and punctuation.

### **Ability to:**

- Organize and direct the activities associated with SACOG Board of Directors meetings.
- Establish and maintain effective working relationships with elected officials, staff and general public.
- Interpret and apply administrative rules, procedures and SACOG policies.
- Analyze situations carefully and adopt effective courses of action.
- Conduct research and compose reports and correspondence independently.
- Compile and maintain complex, extensive and confidential information and files.
- Communicate clearly and concisely, both orally and in writing.
- Supervise, train and evaluate assigned personnel.

### **Experience and Training:**

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

#### **Experience:**

Five years of increasingly responsible clerical experience, including experience as secretary to a public board or commission; two years of which must have been in a supervisory capacity.

#### **Training:**

Equivalent to a Bachelor's degree from an accredited college or university with major course work in business, general management, government or a related field.

## COMMUNICATIONS CLASSES

### GRAPHIC DESIGNER I GRAPHIC DESIGNER II ASSOCIATE GRAPHIC DESIGNER SENIOR GRAPHIC DESIGNER

#### DEFINITION

To produce a wide variety of graphic art work for use by staff in presentations, publications, exhibits or displays.

#### DISTINGUISHING CHARACTERISTICS

##### Graphic Designer I

This is the trainee-level class in the Graphic Designer series. This class is distinguished from the Graphic Designer II in that it is designed for individuals with the required education, but no directly related work experience. Employees at this level perform duties in a training capacity, under close, immediate supervision. A Graphic Designer II has some directly related work experience, and performs routine professional duties with minimal supervision, while learning the more complex duties.

##### Graphic Designer II

This is the entry-level class within the Graphic Designer series. This class is distinguished from the Associate Graphic Designer by the performance of the more routine tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters related to established procedures and guidelines as are positions allocated to the Associate level. Employees work under general supervision. Positions in this class are flexibly staffed and may be filled by advancement from the Graphic Designer I level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the Graphic Designer I level.

##### Associate Graphic Designer

This is the full journey-level class within the Graphic Designer series. This class is distinguished from the Graphic Designer II by the assignment of the full range of duties assigned. Employees at this level operate with a high degree of independence, receive only occasional instruction or assistance as new or unusual situations arise and they are fully aware of the operating procedures and policies with the work unit. Positions in this class are flexibly staffed and may be filled by advancement from the Graphic Designer II level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the entry-level class.

### Senior Graphic Designer

This is the advanced journey-level class within the Graphic Designer series. This class is distinguished from the Associate Graphic Designer by the assignment of the most complex of duties assigned. Employees at this level possess special expertise and exercise independent judgment in the performance of their duties. Positions in this class are flexibly staffed and may be filled by advancement from the Associate Graphic Designer level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the journey-level class.

### SUPERVISION RECEIVED AND EXERCISED

#### Graphic Designer I

Receives immediate supervision from the Manager of Communications or another supervisory position.

#### Graphic Designer II

Receives general supervision from Manager of Communications or another supervisory position. May exercise technical and functional supervision over subordinate graphics positions.

#### Associate Graphic Designer

Receives general instructions from Manager of Communications or another supervisory position. May exercise technical and functional supervision over subordinate graphics-related positions.

#### Senior Graphic Designer

Receives general direction from the Manager of Communications or another supervisory position. May exercise direct or technical and functional supervision over subordinate staff.

### EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Receives work order requests from sections and establishes production schedules and priorities to meet deadlines.
- Designs and produces newsletters, reports and other materials.
- Coordinates with the staff in developing ideas; produces graphic materials in support of projects; designs preliminary layouts; acquires cost estimates and establishes schedules for production of maps, reports, brochures, pamphlets, charts, posters and displays.
- Coordinates with printers on individual publications, cost estimates, press time, reproduction problems, materials and assuring monetary and quality control.
- Produces graphics to exhibit information from statistical data, legal descriptions and field surveys; maintains a retrieval system for maps and graphic material.

- Produces a variety of sketches, illustrations and camera-ready art work and performs photography duties as necessary, including supervision of video shoots.
- Responds to requests for information from governmental agencies and other groups and individuals.
- Provides creative leadership and manages agency identity/branding.
- Participates in strategy sessions with internal and external staff and designs marketing campaigns that incorporate the strengths of all media.
- Maintains retrieval system for images and graphic materials.
- Performs related duties as assigned.

## **MINIMUM QUALIFICATIONS**

### **Graphic Designer I**

#### **Knowledge of:**

- Procedures, principles and practices of graphic design.
- Materials and equipment used in graphic work.
- Techniques for interpreting statistical data with charts and graphs.
- Reproduction and printing processes and requirements.
- Methods and techniques of drawing, tracing, charting, mapping and diagramming.
- Principles and practices of photography.

#### **Ability to:**

- Devise creative solutions to problems of graphic presentation.
- Design and produce finished artwork.
- Effectively utilize a variety of media.
- Estimate reproduction costs.
- Work efficiently under pressure.
- Establish and maintain cooperative relationships with those contacted in the course of work.
- Communicate clearly and concisely, both orally and in writing.

#### **Experience and Training:**

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

#### **Experience:**

No experience is required.

**Training:**

Completion of a specific vocational graphics-training program beyond the high school level; or completion of 30 semester units or 45-quarter units from an accredited college or university in graphic art, commercial art, or closely related field.

**License or Certificate:**

Possession of a valid California driver's license may be required for some assignments. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

**Graphic Designer II**

In addition to the qualifications of Graphic Designer I:

**Ability to:**

- Organize, schedule and prioritize work assignments.
- Lead less experienced personnel in assignments.

**Experience and Training:**

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

**Experience:**

Two years of experience performing graphic design duties.

**Associate Graphic Designer**

In addition to the qualifications of Graphic Designer II:

**Knowledge of:**

- GIS software

**Ability to:**

- Design and create web graphics.
- Manage agency identity and branding.
- Supervise video shoots and edit videos.
- Manipulate images, graphics, text, audio and video to create finished print and web-ready product.



**Experience and Training:**

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

**Experience:**

Three years of experience performing graphic design duties.

**Training:**

Equivalent to a bachelor's degree from an accredited college or university with major course work in communications, graphic design, or a related field.

**Senior Graphic Designer**

In addition to the qualifications of the Associate Graphic Designer:

**Knowledge of:**

- Video and audio production techniques.
- HTML language and basic web authoring techniques.
- Signage construction and design requirements.
- Advanced color theory.

**Ability to:**

- Define and maintain graphic design standards.
- Manage agency identity and branding.
- Manage signage design and installation.
- Develop effective visual communications strategies.
- Perform advanced color correcting of images.
- Convert GIS files to illustrations for print and other media.

**Experience and Training:**

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

**Experience:**

Four years of responsible professional graphic design experience.

**Training:**

Continuing education programs related to the field.  
Participation in professional organizations for graphic designers.

**PUBLIC INFORMATION COORDINATOR I  
PUBLIC INFORMATION COORDINATOR II  
ASSOCIATE PUBLIC INFORMATION COORDINATOR  
SENIOR PUBLIC INFORMATION COORDINATOR**

**DEFINITION**

To perform professional public information, community involvement, marketing and advertising duties.

**DISTINGUISHING CHARACTERISTICS**

**Public Information Coordinator I**

This is the trainee-level class in the Public Information Coordinator series. This class is distinguished from the Public Information Coordinator II by the performance of the more routine professional tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters related to established procedures and guidelines as are positions allocated to the II level.

**Public Information Coordinator II**

This is the entry-level class within the Public Information Coordinator series. This class is distinguished from the Associate Graphic Designer by the performance of the more routine tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters related to established procedures and guidelines as are positions allocated to the Associate level. Employees work under general supervision. Positions in this class are flexibly staffed and may be filled by advancement from the I level or from another equivalent class.

**Associate Public Information Coordinator**

This is the full journey-level class within the Public Information Coordinator series. This class is distinguished from the Public Information Coordinator II by the assignment of the full range of professional duties assigned. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and they are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and may be filled by advancement from the II level or from another equivalent class. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the entry-level class.

**Senior Public Information Coordinator**

This is the advanced journey-level class within the Public Information Coordinator series. This class is distinguished from the Associate Public Information Coordinator by the assignment of the most complex professional duties assigned. Employees at this level possess special expertise and exercise independent judgment in the performance of their duties. Positions in this class are flexibly staffed and may be filled by advancement from the Associate level or from another equivalent class. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the journey-level class.

## SUPERVISION RECEIVED AND EXERCISED

### Public Information Coordinator I

Receives immediate supervision from the Manager of Communications or another supervisory or management position.

### Public Information Coordinator II

Receives general supervision from the Manager of Communications or another supervisory or management position. May exercise technical and functional supervision over less experienced personnel.

### Associate Public Information Coordinator

Receives general instructions from the Manager of Communications or another supervisory position. May exercise technical and functional supervision over subordinate staff.

### Senior Public Information Coordinator

Receives general direction from the Manager of Communications or another supervisory position. May exercise direct or technical and functional supervision over subordinate staff.

## EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Assists in planning and implementing advertising campaigns, including the Annual Marketing Plan.
- Develops marketing materials, in coordination with the Graphic Designer.
- Assists in developing and placing advertisements in all appropriate media.
- Develops and maintains media contacts and relations programs, updating media contacts list as needed.
- Edits and coordinates the distribution of public relations materials.
- Researches and writes press releases, public service announcements and newsletter articles.
- Assists in planning public hearings and community workshops on transportation issues.
- Arranges for the production of posters, signs, exhibits, displays, videos, slide shows and other marketing materials.
- Represents the department before the news media; speaks at workshops, panel discussions, fairs and other similar events.
- Organizes, assigns, monitors and evaluates the flow of work to assigned personnel.
- Develops public education and outreach programs using written materials, targeted personal communications, and focused media strategies.
- Identifies stakeholders and their concerns, and analyzes and reports findings.
- Hosts public meetings, tours, listening sessions, and other outreach events.

- Conducts logistical planning for community-level and regional workshops, forums, and trade shows.
- Maintains SACOG Speakers Bureau and schedules staff presentations.
- Ensures that SACOG adheres to Title VI and Environmental Justice rules and regulations.
- Performs related duties as assigned.

## **MINIMUM QUALIFICATIONS**

### **Public Information Coordinator I**

#### **Knowledge of:**

- Basic public information and marketing principles, including media buying, copy writing, public relations, special events planning and marketing program evaluation.
- Usage of Arbitron ratings for media buying.

#### **Ability to:**

- Gather, compile and analyze marketing data.
- Apply public information and marketing principles and techniques to specific situations.
- Coordinate public information and marketing projects.
- Analyze situations accurately and adopt effective courses of action.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective relationships with those contacted in the course of work.

#### **Experience and Training:**

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

##### **Experience:**

One year of responsible professional public information or marketing experience.

##### **Training:**

Equivalent to a bachelor's degree from an accredited college or university with major course work in marketing, journalism, communications, public relations or a related field.

#### **License or Certificate:**

Possession of a valid California driver's license may be required for some assignments. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

### **Public Information Coordinator II**

In addition to the qualifications of the Public Information Coordinator I:

#### **Knowledge of:**

- Issues and trends in local transportation and planning.
- Techniques for preparing, producing and disseminating information to the general public, news media, community groups and schools.

#### **Ability to:**

- Lead less experienced personnel in assignments.
- Compose, coordinate, and edit a variety of educational, informational and promotional materials.
- Prepare written analysis, evaluation, summaries, recommendations, correspondence and reports.
- Communicate effectively to a general audience regarding planning issues and information.
- Coordinate moderately complex projects.

#### **Experience and Training:**

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

##### **Experience:**

Two years of responsible professional public information or marketing experience.

### **Associate Public Information Coordinator**

In addition to the qualifications of the Public Information Coordinator II:

#### **Knowledge of:**

- Techniques for identifying stakeholders and their concerns, and targeting personal communications to ensure effective information is provided to those who need it and that maximum and diverse participation in workshops and other events is achieved.
- Title VI and Environmental Justice rules and regulations.
- Techniques for preparing, producing and disseminating information to a wide range of specific interest and community groups.

**Ability to:**

- Customize educational, informational and promotional materials for individual groups, communities, and organizations.
- Communicate effectively to a wide range of interest and community groups, tailoring communications to the specific needs and concerns of the specific group.
- Coordinate complex communication projects.
- Foster positive relationships with other government agencies and business, community, and service organizations.

**Experience and Training:**

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

**Experience:**

- Three years of responsible professional public information or marketing experience.

**Senior Public Information Coordinator**

In addition to the qualifications of the Associate Public Information Coordinator:

**Knowledge of:**

- Managerial techniques including coordinating information between staff, departments, the media and community groups; training staff; and strategic and collaborative planning meetings and projects.

**Ability to:**

- Abilities listed in above classes.
- Develop and manage multiple consultant budgets.
- Develop and manage work scope and budgets for community and media relations efforts.
- Respond to requests for information from media personnel and the public; distributes promotional materials, including flyers, brochures, and press kits; disseminates information via the appropriate media.
- Develop and implement communication concepts, policies and standards for the operation of the website and other emerging communication technologies, within overall goals and parameters set by senior management.
- Gather, edit, coordinate and upload information for/to the web site; may assist with the design of consistent methodologies for the development of internet/intranet and new emerging technological communication resources.

**Experience and Training:**

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

**Experience:**

- Four years of responsible professional public information or marketing experience.

**EXECUTIVE CLASSES**  
(Incumbents retained under at-will employment agreements  
with more detailed position descriptions.)

**DIRECTORS**

**DEFINITION**

To assist the Executive Director by directing the work in one of SACOG's major functional areas; to assist the Executive Director in carrying out the day-to-day work of SACOG's staff. Directors are members of the executive management team.

**SUPERVISION RECEIVED AND EXERCISED**

Receives policy direction from the Executive Director and from the Board of Directors.

Exercises direct and indirect supervision over assigned clerical, technical, professional, supervisory and management personnel.

**EXAMPLES OF DUTIES**

Depending upon assignment, duties may include, but are not limited to, the following:

- Prepares third-party contracts/agreements for the completion of work contained in the Overall Work Program; reviews contracts and agreements within assigned subject areas for content and financial terms and conditions prior to Executive Director approval.
- Provides staff support to one or more of SACOG's standing Board committees.
- Pursues discretionary funding sources to advance the Board's priority projects and innovative program ideas.
- Prepares program budgets; assists in overall budget implementation; monitors workload and costs to remain within budget; forecasts funds needed for staffing, equipment, materials and supplies.
- Initiates and directs new program development.
- Coordinates with other SACOG programs, working closely with senior staff and with outside agencies.
- Oversees consultant selection, negotiates contracts, reviews and evaluates consultant work products and monitors compliance with contracts.
- Reviews, approves, prepares and presents reports to the public, media and governing bodies; represents SACOG as necessary.
- Maintains contacts with outside organizations and individuals in support of assigned SACOG programs.
- Performs the most complex analyses; supervises the conduct of technical work to assure quality and accuracy of results; coordinates peer review as appropriate.
- Serves as Acting Executive Director when assigned.
- Trains or advocates training for assigned staff; evaluates staff performance; works with assigned staff to correct deficiencies; implements disciplinary procedures as required; makes recommendations regarding employee termination.
- Performs related duties as assigned.

## **MINIMUM QUALIFICATIONS**

### **Knowledge of:**

- Organizational and management practices as applied to the analysis and evaluation of programs, policies and operational needs.
- Principles and practices of supervision, training and personnel management.
- Principles and practices of assigned area of responsibility.
- Principles and practices of policy development and implementation.
- Principles and practices of business correspondence and report writing.
- Pertinent local, state and federal laws, rules and regulations.
- Principles and practices of budget administration.
- Principles and practices of organizational planning, administration and personnel management.
- Local geography and resources as related to regional issues and activities.

### **Ability to:**

- Organize, direct and implement a comprehensive planning, operational, or administrative program.
- Prepare documentation, meet deadlines and successfully report on work progress.
- Gain cooperation through discussion and persuasion.
- Analyze problems and identify alternative solutions, project consequences of proposed actions and present recommendations clearly.
- Interpret and apply organizational policies, procedures, rules and regulations.
- Prepare and administer a budget.
- Supervise, train and evaluate personnel.
- Work with government officials, organizations and community groups.
- Prepare and present clear and concise presentations.
- Interpret and apply SACOG policies, procedures, rules and regulations.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

### **Experience and Training:**

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

#### **Experience:**

Six years of increasingly responsible professional planning, operational, or administrative experience, including three years of experience supervising professional planning staff and having direct contact with a board of elected officials.

**Training:**

Equivalent to a bachelor's degree from an accredited college or university with major course work in planning, public administration, urban design or a related field.

**License or Certificate:**

Possession of a valid California driver's license is required. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

## EXECUTIVE DIRECTOR

### DEFINITION

To plan and direct SACOG's area-wide planning program; to serve as the chief executive officer of SACOG, responsible for all projects and properties; to serve as Secretary to the Board.

### SUPERVISION RECEIVED AND EXERCISED

Receives policy direction from the Board of Directors.

Exercises direct and indirect supervision of SACOG's staff.

### EXAMPLES OF DUTIES

Duties may include, but are not limited to, the following:

- Plans, organizes, directs and supervises the planning and administrative activities of SACOG's staff.
- Coordinates transportation, land use, environmental and other planning programs.
- Directs planning, research and review of applications for funds from agencies within the region.
- Responds to requests from Board members, member agencies and SACOG staff.
- Works cooperatively with and represents SACOG to partner agencies.
- Coordinates and works closely with Federal and State lobbyists to develop funding proposals.
- Proposes goals and policies for SACOG review.
- Identifies planning problems and develops and implements programs for solution on an area-wide basis.
- Reviews work elements with SACOG management and makes difficult decisions on subjects involving SACOG policy.
- Maintains liaison with agencies, groups and individuals affected by, involved with or contributing to the planning program.
- Represents SACOG before various governing boards, presenting and discussing planning proposals, problems and issues.
- Meets with concerned community groups and individuals regarding area-wide planning.
- Projects planning program needs and work plans, and prepares the program budget for Board approval.
- Reviews and revises organization and work assignments to meet new and changing needs.
- Administers the Affirmative Action Plan.
- Implements and directs staff development programs for SACOG personnel.
- Coordinates area-wide planning activities with other levels of government, including Federal, State and local.

- Recruits and selects SACOG personnel in cooperation with managers, supervisors and human resources staff; plans, assigns, directs and reviews the work of management staff.
- Performs other duties as requested by the Board of Directors.

### **DESIRABLE QUALIFICATIONS**

#### **Knowledge of:**

- Principles of administration, including personnel, budgeting, training and department organization.
- Principles and procedures of transportation, land use, environmental and other SACOG planning activities.
- Techniques used in the development of area-wide plans in a cooperative manner with local plans.
- Federal, State and local laws, rules and regulations relating to planning and administrative activities.
- Various sources of funds available for planning projects.

#### **Ability to:**

- Plan, organize and direct a comprehensive area-wide planning program.
- Administer area-wide plans, policies and programs.
- Interpret, explain and apply applicable laws, rules and regulations.
- Serve as adviser to SACOG, member agencies and the general public on area-wide planning matters.
- Prepare and enforce SACOG policies and procedures relating to personnel, training, budget and organization.
- Establish and maintain cooperative and effective working relationships with subordinates, elected and appointed officials and the general public.

#### **Experience and Training:**

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

##### **Experience:**

Seven years of professional planning or administrative experience, including four years in a responsible supervisory and administrative position.

##### **Education:**

Equivalent to graduation from an accredited college or university with major course work in planning, government, public administration or related field.

## INFORMATION TECHNOLOGY CLASSES

### INFORMATION TECHNOLOGY ANALYST I INFORMATION TECHNOLOGY ANALYST II ASSOCIATE INFORMATION TECHNOLOGY ANALYST SENIOR INFORMATION TECHNOLOGY ANALYST

#### DEFINITION

To perform a variety of professional, technical and analytical duties in the programming, operation and maintenance of computer systems, websites and networks.

#### DISTINGUISHING CHARACTERISTICS

##### Information Technology Analyst I

This is the entry-level class in the Information Technology Analyst series. This class is distinguished from the Information Technology Analyst II by the performance of the more routine tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters related to established procedures and guidelines as are positions allocated to the Information Technology Analyst II level.

##### Information Technology Analyst II

This is the full journey-level class within the Information Technology Analyst series. This class is distinguished from the Information Technology Analyst I by the assignment of the more complex duties assigned to the class. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and they are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and may be filled by advancement from the Information Technology Analyst I level. In some cases, depending upon the complexity of duties, job performance and the needs of the agency, an employee may remain classified at the Information Technology Analyst I level.

##### Associate Information Technology Analyst

This is the advanced journey-level class in the Information Technology series. This class is distinguished from the Information Technology Analyst II level by the assignment of the full range of professional duties. Employees at this level operate with a high degree of independence. Advancement to the Associate Information Technology Analyst level requires that the employee be performing or capable of performing the full range of the duties for the class. Positions in this class are flexibly staffed and may be filled by advancement from the Information Technology Analyst II level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the journey-level class.

##### Senior Information Technology Analyst

This is the supervisory-level class in the Information Technology Analyst series. Positions at this level are distinguished from other classes within the series by the level of independence, the

degree of responsibility assumed and level of complexity in assigned tasks. Incumbents perform the

most difficult and responsible duties assigned to classes within this series and may provide direct supervision to less experienced personnel. They are often given management-level responsibility for a major segment of the Information Systems work program and perform complex technical duties requiring specialized training and experience.

### **SUPERVISION RECEIVED AND EXERCISED**

#### **Information Technology Analyst I**

Receives general supervision from the Senior Information Technology Analyst, the Manager of Communications, or another management or supervisory position.

#### **Information Technology Analyst II**

Receives direction from the Senior Information Technology Analyst, the Manager of Communications, or another management or supervisory position.

May exercise technical and functional supervision over assigned personnel.

#### **Associate Information Technology Analyst**

Receives direction from the Senior Information Technology Analyst, the Manager of Communications, or another management or supervisory position.

May exercise technical and functional supervision over assigned personnel.

#### **Senior Information Technology Analyst**

Receives direction from the Director of Research & Analysis or another management position.

Typically exercises direct supervision over less experienced professional and technical personnel.

### **EXAMPLES OF DUTIES**

Depending upon assignment, duties may include, but are not limited to, the following:

- Designs and implements computer programs and databases.
- Assists in gathering, compiling, analyzing and interpreting data; summarizes compiled data and presents them in the form of reports, tables or statistical analyses.
- Coordinates and performs research and analysis on database development and programming projects.
- Provides technical assistance to computer service users; answers questions and explains computer system procedures.

- Determines proper installation parameters for software and hardware.
- Analyzes, detects, identifies and corrects technical problems and deficiencies.
- Plans, develops and implements backup and recovery procedures.
- Creates and maintains web sites; maintains web servers and Internet applications.
- Serves as system administrator for SACOG's computer systems and networks.
- Performs complex system and application programming tasks using various programming languages and database management systems.
- Participates in decisions relating to the selection and purchase of hardware and software.
- Oversees in the work of other information technology staff.
- Oversees the orderly development and maintenance of numerous, complex networks.
- Assists in the coordination, prioritization and evaluation of work assigned to the section.
- Provides technical assistance to local agencies.
- Conducts user seminars and workshops.
- Performs related duties as assigned.

### **MINIMUM QUALIFICATIONS**

#### **Information Technology Analyst I**

##### **Knowledge of:**

- Principles and practices of computer programming languages and techniques.
- Computer applications, including spreadsheet, database, statistical and word processing software.
- Principles, practices, methods and techniques used in modern data processing.
- Basic quantitative and statistical calculating methods.
- Principles, practices and techniques of customer service.
- Web server software, web programming languages and internet applications.

##### **Ability to:**

- Design and prepare effective and efficient computer programs.
- Assist others in the use of computer software and hardware.
- Assist others in determining computer service needs and how they can be met.
- Perform statistical analyses and mathematical computations.
- Analyze situations accurately and adopt effective courses of action.
- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

**Experience and Training:**

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

**Experience:**

No experience required.

**Training:**

Equivalent to a bachelor's degree from an accredited college or university with major course work in information technology, computer science or a related field.

Technical experience in computer programming, database administration or network administration may substitute for the education requirement on a year-for-year basis.

**License or Certificate:**

Possession of a valid California driver's license may be required for some assignments. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

**Information Technology Analyst II**

In addition to the qualifications of the Information Technology Analyst I:

**Knowledge of:**

- Computer hardware and data communications equipment.
- Multi-user operating system software.
- Database design, tools, utilities, security methods and management systems.
- Installation, maintenance and troubleshooting of client/server and desktop computer systems and software.
- Network server restart and recovery concepts.
- Internet and intranet architecture.
- Complex web applications.

**Ability to:**

- Design effective formats for computer databases, print-outs, input screens and forms.
- Interpret technical and statistical data.
- Design and maintain website to industry standards.

**Experience and Training:**

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

**Experience:**

Two years of professional experience in computer programming, database administration, Web design and development, or network administration.

**Associate Information Technology Analyst**

In addition to the qualifications of the Information Technology Analyst II:

**Knowledge of:**

- Systems and program design and analysis.
- Principles and techniques of programming, data backup and disaster recovery.
- Programming languages and utilities.
- Software systems development life cycle.
- Principles and techniques of software and systems quality assurance and control.
- Principles, processes, techniques of project management and related software.
- Network design, hardware and software, security methods, documentation, configuration, maintenance and diagnostic techniques.
- Systems and performance monitoring.

**Ability to:**

- Recognize problems, develop recommendations and solutions, oversee correction within assigned specialty.
- Understand highly complex information technology systems and issues
- Promote and maintain a team environment
- Assist in analysis, research, recommendation and purchasing of hardware and software.

**Experience and Training:**

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

**Experience:**

Three years of professional experience in computer programming, database administration, Web design and development, or network administration.

### Senior Information Technology Analyst

#### Knowledge of:

- Principles and practices of network administration.
- Computer hardware and data communications equipment.
- Network security policies, techniques and procedures.
- DNS techniques and procedures.
- E-mail systems principles and techniques.
- Principles and practices of integrating diverse networking systems.

#### Ability to:

- Analyze and correct network and server problems in a timely manner.
- Assume independent responsibility for major research and data processing projects.
- Assess future network, server and other information technology needs, and make appropriate recommendations.
- Coordinate, prioritize and review the work of others in a research-oriented organization.
- Collect, analyze and interpret technical and statistical data.
- Design and prepare effective and efficient databases.
- Identify appropriate hardware and software for specific data needs.
- Make clear and concise presentations to public groups, as assigned.

#### Experience and Training

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

##### Experience:

Four years of professional experience in computer programming, network administration and database administration and analysis.

**MANAGEMENT CLASSES**  
(Incumbents retained under at-will employment agreements  
with more detailed position descriptions.)

**MANAGERS**

**DEFINITION**

To manage, direct and coordinate one or more of SACOG's programs.

**SUPERVISION RECEIVED AND EXERCISED**

Receives administrative direction from a Director or the Executive Director.

Exercises supervision over assigned staff.

**EXAMPLES OF DUTIES**

Depending upon assignment, duties may include, but are not limited to, the following:

- Assigns work activities to assigned staff; monitors workload and costs to remain within budget; helps forecast additional funds needed for staffing, equipment, materials and supplies; administers the approved budget.
- Participates in recommendations regarding the appointment of personnel; trains or advocates training for assigned staff; evaluates staff performance; works with assigned staff to correct deficiencies; implements disciplinary procedures as required; makes recommendations regarding employee termination.
- Monitors contracts with consultants for activities related to assigned programs.
- Directs the preparation of staff reports for the SACOG Board and its committees.
- Presents reports to the public, committees and elected boards and otherwise represents SACOG as necessary.
- Prepares program budget and assists in preparing the overall SACOG budget.
- Provides technical assistance, training and workshops to member agencies.
- Performs related duties as assigned.

**MINIMUM QUALIFICATIONS**

**Knowledge of:**

- Pertinent federal, state and local regulations regarding assigned programs.
- Organization and functions of the various agencies involved in assigned programs.
- Effective contract administration methods and procedures.
- Principles and practices of organization, administration, budget and personnel management.
- Principles and practices of supervision, training and performance evaluation.

**Ability to:**

- Assume independent responsibility for major projects.
- Prepare and monitor a budget.
- Supervise, train and evaluate personnel.
- Interpret and explain SACOG policies and procedures.
- Establish and maintain effective working relationships both internally and externally.
- Interpret and explain complex and highly technical concepts.
- Analyze situations accurately and adopt effective courses of action.
- Facilitate meetings and bring parties to agreement.
- Communicate clearly and concisely, both orally and in writing.
- Effectively present proposals and ideas to SACOG, local officials, and other interested groups and individuals.

**Experience and Training:**

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

**Experience:**

Four years of responsible professional experience in assigned program area, preferably including one year of lead supervisory experience.

**Training:**

Equivalent to a bachelor's degree from an accredited college or university with major course work in assigned field.

**License or Certificate:**

Possession of a valid California driver's license is required. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis. Depending on the nature of the assignment, engineering or other registrations could be required.

## PRINCIPAL PROGRAM EXPERT

### DEFINITION

To provide expertise in a specialized area that is critical to the mission of the organization; to advise and assist the Executive Director in the development, evaluation, and implementation of programs, policies, and procedures relating to the area of assignment.

### DISTINGUISHING CHARACTERISTICS

This is a management classification in which an incumbent typically independently represents the organization; is a subject-matter expert who possesses highly specialized knowledge, skills, abilities and experience; and is responsible for a specialty that has a major impact on the organization. This class may supervise subordinates, but in some instances may not.

### SUPERVISION RECEIVED AND EXERCISED

Receives administrative direction from a Director and the Executive Director. May exercise direct supervision over assigned staff or technical and functional supervision over other team members.

### EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Participates in the development, evaluation and implementation of programs, policies and procedures.
- Responds to requests from SACOG staff, Board members and member agencies; provides technical expertise regarding highly complex subject matter.
- Represents SACOG with governing boards, partner agencies, member jurisdictions and the general public.
- Maintains liaison with agencies, groups and individuals affected by, involved with or contributing to the program area.
- Meets with concerned community groups and individuals regarding area-wide planning.
- Coordinates area-wide planning activities with other levels of government, including Federal, State and local.
- Performs other duties as requested by the executive team and Board of Directors.

### MINIMUM QUALIFICATIONS

#### Knowledge of:

- Principles, practices and procedures involved in the area of assignment.
- Federal, State and local laws, rules and regulations relating to planning.

**Ability to:**

- Interpret, explain and apply applicable laws, rules and regulations.
- Serve as adviser to SACOG, member agencies and the general public in the area of assignment.
- Establish and maintain cooperative and effective working relationships with member agencies, elected and appointed officials and the general public.
- Communicate effectively, both orally and in writing.
- Effectively supervise assigned staff.

**Experience and Training:**

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

**Experience:**

Four years of increasingly responsible experience in the area of assignment.

**Training:**

Equivalent to completion a bachelor's degree from an accredited college or university with major course work in the field of assignment.

**License or Certificate:**

Possession of a valid California driver's license may be required for some assignments. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis. Depending on the nature of the assignment, engineering or other registrations could be required.

## PLANNING CLASSES

JUNIOR PLANNER  
ASSISTANT PLANNER  
ASSOCIATE PLANNER  
SENIOR PLANNER  
SUPERVISING SENIOR PLANNER

### DEFINITION

To perform professional planning duties in an assigned area of responsibility including transit, transportation, land use, air quality, housing or other planning areas.

### DISTINGUISHING CHARACTERISTICS

#### Junior Planner

This is the trainee-level class in the Planner series. This class is distinguished from the Assistant Planner in that Junior Planner is designed for individuals with the required education, but no directly related work experience. Employees at this level perform duties in a training capacity, under close, immediate supervision. An Assistant Planner has some directly related work experience, and performs routine professional duties with minimal supervision, while learning the more complex duties.

#### Assistant Planner

This is the entry-level class in the Planner series. This class is distinguished from the Associate Planner by the performance of the more routine professional tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters related to established procedures and guidelines as are positions allocated to the Associate Planner level. Positions in this class are flexibly staffed and may be filled by advancement from the Junior Planner level.

#### Associate Planner

This is the full journey-level class within the Planner series. Positions at this level are distinguished from Junior Planner and Assistant Planner by assuming full responsibility for projects and performing more difficult and responsible duties, including project management. Employees at this level may provide lead supervision over lower-level professional personnel or direct supervision over clerical or technical personnel. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and they are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and may be filled by advancement from Assistant Planner level. In some cases, depending upon complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the Assistant Planner level.

### Senior Planner

This is the advanced journey/supervisory-level class in the Planner series. Positions at this level are distinguished from other classes within the series by assuming full responsibility for major, highly complex projects and providing specialized expertise. Employees perform the most difficult and responsible duties assigned to classes within this series and typically supervise professional Planners. Incumbents are given management-level responsibility for a major segment of the work program, and perform complex professional planning duties requiring specialized training and experience. Positions in this class are flexibly staffed and may be filled by advancement from Associate Planner level. In some cases, depending upon complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the Associate Planner level.

### Supervising Senior Planner

Positions at this level are distinguished from other classes within the series by having substantial supervisory responsibilities. Positions in this class are flexibly staffed and may be filled by advancement from the Senior Planner level. In some cases, depending upon the amount of supervisory responsibility, job performance, and the needs of the agency, an employee may remain classified at the Senior Planner level.

## SUPERVISION RECEIVED AND EXERCISED

### Junior Planner

Receives immediate supervision from a Director, the Project Delivery Manager, a Senior Planner or another supervisory or management position. May receive technical and functional supervision from an Associate Planner.

### Assistant Planner

Receives general supervision from a Director, the Project Delivery Manager, a Senior Planner or another supervisory or management position. May receive direct or technical and functional supervision from an Associate Planner.

May provide technical and functional supervision to less experienced professional, technical, or clerical personnel.

### Associate Planner

Receives direction from a Director, the Project Delivery Manager, a Senior Planner or another supervisory or management position.

May exercise direct or technical and functional supervision over less experienced professional Planners or clerical or technical personnel.

### Senior Planner

Receives general direction from a Director, the Project Delivery Manager, or another management position.

Typically exercises direct supervision over less experienced professional Planners or clerical or technical personnel. Exercises technical and functional project over professional positions.

### Supervising Senior Planner

Receives general direction from a Director or another management position.

Routinely exercises direct supervision over multiple, less-experienced professional planners as well as technical and functional supervision over experienced staff, including senior planners.

### EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Gathers a variety of information and data for the preparation of planning reports and studies.
- Performs specific office and field assignments in connection with planning and development within the region; compiles statistics and engages in research preparatory to various phases of planning projects; develops maps, charts and graphs used in planning studies and reports.
- Assists in compiling, arranging, analyzing and interpreting data; analyzes and summarizes compiled data and presents them in the form of reports, tables or statistical analyses.
- Assists in making comparative studies of land use, population structure, economic activities, housing, transportation, environmental factors and related subjects.
- Researches, investigates and surveys available sources for information used in planning studies and related projects.
- Answers inquiries and assists the public in matters relating to the functions of SACOG.
- Assists in preparation of grant applications for planning projects.
- Maintains liaison with agencies involved in or affected by planning studies and projects.
- Plans and prepares moderately complex planning projects or significant portions of complex projects.
- Performs related duties as assigned.

Additional duties performed by an Associate Planner include:

- Plans, directs and reviews the conduct of complex studies relating to land use, transportation, population, environment and related areas of planning.
- Assists in preparation of the work program; identifies areas requiring study and research.
- Assigns work activities and tasks to professional personnel.
- Provides assistance to local agencies in the development of grant proposals.
- Forms, coordinates and facilitates local government committees regarding policy and technical planning issues.

- Reviews proposals, making difficult determinations regarding the extent to which proposals meet established standards and criteria.
- Responds to detailed or difficult requests for information from local agencies, consultants and other groups and individuals.
- Independently performs difficult research work, applying specialized research and analytical methods and techniques.
- Maintains liaison with agencies involved in or affected by planning studies and projects.
- Represents SACOG before legislative and administrative bodies of member agencies and other groups.
- Prepares requests for proposals; organizes consultant selection; develops scopes of work for complex planning projects.
- Presents reports to the public, the media, technical and policy committees and boards of elected officials, including SACOG's Board of Directors.
- Develops proposed policies, works with member jurisdictions, prepares reports and monitors project status to ensure that the region delivers projects and maintains project funding.
- Interprets programming laws, guidelines and regulations and answers questions for SACOG's Board of Directors, member jurisdictions and the general public.

Additional duties performed by a Senior Planner include:

- Supervises, trains and evaluates professional planning staff.
- Manages a major section of the work program, using specialized expertise.
- Conducts complex, technical analyses of transportation plans, corridor studies and air quality conformity; summarizes analyses in clear and concise reports.

Additional duties performed by a Supervising Senior Planner include:

- Directly supervises multiple, less-experienced professional planners and exercises technical and functional supervision over experienced staff, including Senior Planners.

## MINIMUM QUALIFICATIONS

### Junior Planner

#### Knowledge of:

- Principles and techniques of research and statistical analysis.
- Principles, concepts and techniques of planning.
- Principles and practices of computers.

#### Ability to:

- Gather, compile and analyze technical and statistical data.
- Analyze situations accurately and adopt effective courses of action.
- Learn applicable laws and regulations.

- Perform mathematical and statistical calculations with accuracy and precision.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective relationships with those contacted in the course of work.

**Experience and Training:**

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

**Experience:**

No experience required. Related student internship experience is preferred.

**Training:**

Equivalent to a bachelor's degree from an accredited college or university with major course work in planning, economics, public administration or a related field.

**License or Certificate:**

Possession of a valid California driver's license may be required for some assignments. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

**Assistant Planner**

In addition to the qualifications of the Junior Planner:

**Knowledge of:**

- Principles and techniques of research and statistical analysis as applied to government planning.
- Pertinent legal requirements relating to planning.
- Trends in Federal, State and local planning.
- Local geography and resources as they relate to regional planning.

**Ability to:**

- Coordinate moderately complex planning projects.

**Experience and Training:**

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

**Experience:**

One year of professional planning experience.

**Associate Planner**

In addition to the qualifications of the Assistant Planner:

**Knowledge of**

- Organization and function of Federal, State and local government agencies participating in regional planning.
- Principles and practices of budget preparation and monitoring.

**Ability to:**

- Apply planning principles and techniques to specific situations.
- Lead less experienced personnel in assignments.
- Coordinate complex planning projects.

**Experience and Training:**

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

**Experience:**

Two years of professional planning experience.

**Senior Planner**

In addition to the qualifications of the Associate Planner:

**Knowledge of:**

- Principles and practices of supervision, training and performance evaluation.
- Principles and practices of regional and local planning.
- Legal requirements relating to regional and local planning.
- Pertinent State, Federal and local law, rules and ordinances.

- GIS software programs, data sources and data collection and management procedures.

**Ability to:**

- Assume independent responsibility for major regional and local planning projects.
- Perform difficult grant review work.
- Supervise, train and evaluate assigned staff.
- Effectively present proposals and ideas to SACOG, local officials, and other interested groups and individuals.

**Experience and Training:**

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

**Experience:**

Four years of increasingly responsible professional planning experience, preferably including some supervisory experience.

**Supervising Senior Planner**

In addition to the qualifications of the Senior Planner:

**Knowledge of:**

- Principles and practices of team leadership.

**Ability to:**

- Effectively lead teams of professional planning staff in conducting multiple and complex planning projects.

**Experience and Training:**

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

**Experience:**

Five years of increasingly responsible professional planning experience, including two years in a supervisory capacity.

## RESEARCH CLASSES

### RESEARCH TECHNICIAN

#### DEFINITION

To perform paraprofessional and technical duties in the collection, management, analysis and reporting of data used for research, modeling and studies.

#### DISTINGUISHING CHARACTERISTICS

This is the paraprofessional class in the Research Analyst series. This class is distinguished from the Research Analyst in that a Research Technician performs the duties that are generally limited in scope and within the design and procedural framework established by higher-level employees. Most of the duties assigned to this type of position are routine, involving large amounts of database entry and editing and the eventual generation of maps and reports from the data.

#### SUPERVISION RECEIVED AND EXERCISED

Receives immediate supervision from an Associate or Senior Research Analyst or another supervisory or management position. May receive technical and functional supervision from a Junior or Assistant Research Analyst.

#### EXAMPLES OF DUTIES

- Creates, updates and corrects databases using various software.
- Gathers data from various agencies needed for transportation analysis.
- Performs field checks for updating and correcting data.
- Helps ensure quality control of data for mapping, analysis and reports.
- Assists in gathering, digitizing, analyzing and interpreting spatial data.

#### MINIMUM QUALIFICATIONS

##### Knowledge of:

- Various software products used for data entry, editing and maintenance.
- Principles, concepts and techniques for preparing maps and reports.

##### Ability to:

- Perform data gathering, entry and editing.
- Leverage data to prepare maps, charts and tables.
- Apply techniques to ensure data quality control.
- Communicate clearly and concisely, orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

**Experience and Training:**

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

**Experience:**

The technician may have experience acquired through college, vocational school or vendor-related courses.

**Training:**

Hands-on experience using various computer software used by the Research and Analysis staff through 2-year college, or trade or vocational school or vendor-related courses.

**License or Certificate:**

Possession of a valid California driver's license may be required for some assignments. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

**ASSISTANT RESEARCH ANALYST  
ASSOCIATE RESEARCH ANALYST  
SENIOR RESEARCH ANALYST  
SUPERVISING SENIOR RESEARCH ANALYST**

**DEFINITION**

To assist in professional research, planning and analysis duties, to assist others in the use of transportation planning data and applications; and to respond to a variety of requests for reports, maps and analyses. There are several professional practices and disciplines included in the Research Analyst series. These include Demographics, Geographic Information Systems, Travel Demand Modeling, and Air Quality Modeling. Other disciplines could include Economics and Statistics. Working titles may reflect these disciplines.

**DISTINGUISHING CHARACTERISTICS**

**Assistant Research Analyst**

This is the entry-level class in the Research Analyst series. This class is distinguished from the Associate Research Analyst by the performance of the more routine tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters related to established procedures and guidelines as are positions allocated to the Associate level.

**Associate Research Analyst**

This is the full journey-level class within the Research Analyst series. This class is distinguished from the Assistant Research Analyst by the assignment of the more complex and varied duties assigned to the class. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise, and they are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and may be filled by advancement from the Assistant Research Analyst level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the Assistant Research Analyst level. The Associate Research Analyst is distinguished from the Senior Research Analyst in that the latter is responsible for supervising lower-level Research Analysts and is assigned the most complex and varied projects.

**Senior Research Analyst**

This is the advanced journey/supervisory-level class within the Research Analyst series. Positions at this level are distinguished from other classes within the series by the level of independence, the degree of responsibility assumed and level of complexity in assigned tasks. Incumbents perform the most difficult and responsible duties assigned to classes within this series and typically provide direct supervision to less experienced personnel. They are often given management-level responsibility for a major segment of research and analysis and perform complex technical duties requiring specialized training and experience. Positions in this class are flexibly staffed and may be filled by advancement from the Associate Research Analyst level. In some cases, depending upon the complexity of duties, job performance, and the needs of the agency, an employee may remain classified at the Associate Research Analyst level.

### Supervising Senior Research Analyst

Receives general direction from a Director or another management position.

Routinely exercises direct supervision over multiple, less-experienced professional research analysts as well as technical and functional supervision over experienced staff, including senior research analysts.

### SUPERVISION RECEIVED AND EXERCISED

#### Assistant Research Analyst

Receives general supervision from the Director of Research and Analysis or another supervisory position.

#### Associate Research Analyst

Receives direction from the Director of Research and Analysis or another supervisory position. May exercise functional and technical supervision over interns, clerical, technical, or professional personnel.

#### Senior Research Analyst

Receives direction from the Director of Research and Analysis or another supervisory position. Typically exercises direct supervision over less experienced professional and technical personnel. Exercises technical and functional project supervision over professional positions.

### Supervising Senior Research Analyst

Receives general direction from a Director or another management position.

Routinely exercises direct supervision over multiple, less-experienced professional research analysts as well as technical and functional supervision over experienced staff, including senior research analysts.

### EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Assists in the design and implementation of planning, modeling, research and analysis projects using various software packages.
- Assists in gathering, digitizing, analyzing and interpreting transportation and socioeconomic data.
- Prepares maps displaying a wide variety of geographic information.
- Prepares and maintains required tables and reports.
- Conducts research and analysis on database development.

- Provides technical assistance and training to casual internal GIS, modeling and statistical software users and local jurisdictions; answers questions and explains GIS, modeling and statistical procedures; conducts user seminars and workshops.
- Performs system GIS, modeling and statistical programming tasks using various software products and programming languages.
- Participates in decisions relating to the selection and purchase of hardware and software.
- Assists in preparation of the work program; identifies areas requiring study and research.
- Oversees the orderly development and maintenance of the regional databases for modeling, GIS and other analyses; designs and develops projects and programs for the maintenance of data.
- Performs complex system and scripting/programming tasks using various software products and programming languages.
- Coordinates, prioritizes and evaluates the work assigned to the section.
- Assists staff and member jurisdictions in defining research and analysis needs and obtaining products to meet these needs.
- Coordinates research projects with internal staff and external agencies; facilitates meetings; oversees consultant contracts.
- Independently performs difficult research work, applying specialized research and analytical methods and techniques.
- Prepares requests for proposals; organizes consultant selection; and develops scopes of work for highly complex research projects.
- Supervises, trains and evaluates professional Research Analyst staff.
- Maintains liaison with agencies involved in or affected by planning studies and projects.
- Assists in developing and operating travel demand models for the region; manages the travel data collection; develops databases to support travel demand models and management systems.
- Reviews proposals, making difficult determinations regarding the extent to which proposals meet established standards and criteria.
- Conducts research on travel, land use and air quality forecasting methods.
- Presents reports to the public, the media, technical and policy committees and boards of elected officials, including the SACOG's Board of Directors.
- Performs related duties as assigned.

Additional duties performed by a Supervising Senior Research Analyst include:

- Directly supervises multiple, less-experienced professional planners and exercises technical and functional supervision over experienced staff, including Senior Research Analysts.

## MINIMUM QUALIFICATIONS

### Assistant Research Analyst

#### Knowledge of:

- Principles and practices of geographic information systems, including one GIS, modeling or statistical software program.
- Principles and techniques of research and statistical analysis.
- Principles, concepts, and techniques of planning.
- Computer applications, including spreadsheet, database, statistical and word processing software.
- Basic quantitative and statistical calculating methods.
- Local and regional planning and planning data needs.

#### Ability to:

- Assist in design and development of databases for GIS, modeling and statistical analysis.
- Design and prepare effective tables, reports or GIS maps.
- Gather, compile, and analyze technical and statistical data.
- Analyze situations accurately and adopt effective courses of action.
- Perform mathematical and statistical calculations with accuracy and precision.
- Communicate clearly and concisely, orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Assist others in determining reporting or mapping needs and how they can be met.

#### Experience and Training:

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

##### Experience:

One year of GIS, modeling or statistical analysis experience required.

##### Training:

Equivalent to a bachelor's degree from an accredited college or university with major course work in geography, planning, computer science or a related field with course work in geographic information systems.

**License or Certificate:**

Possession of a valid California driver's license may be required for some assignments. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

**Associate Research Analyst**

In addition to the qualifications of the Assistant Research Analyst:

**Knowledge of:**

- Multiple GIS, modeling or statistical analysis software programs.
- Database management systems.
- Techniques used in presenting data, maps, charts and graphs.
- Programming languages used to customize GIS, modeling or statistical analysis packages.

**Ability to:**

- Design effective formats for computer databases, input screens and forms.
- Write GIS, modeling or statistical analysis macro language procedures.
- Interpret technical and statistical data.
- Train and assist others in the use of GIS, modeling and statistical analysis technology.
- Make clear and concise presentations to public groups.
- Train and supervise Interns using GIS, modeling or statistical analysis programs.

**Experience and Training:**

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

**Experience:**

Two years of professional experience using GIS, modeling or statistical analysis software.

**Senior Research Analyst**

In addition to the qualifications of the Associate Research Analyst:

**Knowledge of:**

- Principles and practices of supervision, training and performance evaluation.
- Principles, practices, methods and techniques used in travel demand modeling, GIS or demographic analysis.

- Multiple software packages for GIS, travel demand modeling or statistical analysis.
- Computer hardware, operating system software and data communications equipment.
- Methods and techniques of data collection used for projects related to SACOG's research and analysis.
- Local and regional planning data and mapping needs.
- Census data and geography.
- Principles and practices of regional and local planning.
- Organization and functions of the various agencies involved in regional planning.

**Ability to:**

- Supervise, train and evaluate assigned personnel.
- Work with GIS, travel model or statistical software.
- Design and implement effective and efficient research and analysis methodologies.
- Write programs and/scripts to perform data processing and analysis tasks.
- Assume independent responsibility for major research and planning-related projects.
- Collect, analyze and interpret technical and statistical data.
- Identify appropriate hardware and software for research and analysis needs.
- Make clear and concise presentations to public groups.
- Organize and facilitate meetings and multi-agency teams.
- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

**Experience and Training:**

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

**Experience:**

Four years of professional experience in a research and planning-oriented environment, preferably including some supervisory experience.

**Training:**

Master's degree may be substituted for two years of professional experience.

**Supervising Senior Research Analyst**

In addition to the qualifications of the Senior Research Analyst:

**Knowledge of:**

- Principles and practices of team leadership.

**Ability to:**

- Effectively lead teams of professional research and analysis staff in conducting multiple and complex research projects.

**Experience and Training:**

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

**Experience:**

Five years of increasingly responsible professional research and analysis experience, including two years in a supervisory capacity.

## STAFF ASSISTANT

### DEFINITION

To perform a wide variety of general duties related to the function and section to which assigned.

This job classification may be used for persons who have completed academic requirements but are working toward professional certification or registration, for persons for which experience is a prerequisite for entrance to graduate school or for persons who have received a degree or diploma but are taking additional course work or need work experience for a specific career field.

### SUPERVISION RECEIVED AND EXERCISED

Receives general supervision from a supervisory position.

### EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Gains practical experience in the professional or technical field of study.
- Researches and compiles a variety of documents, including reports, memos and statistical charts.
- Receives, sorts and distributes mail; acts as a courier.
- Provides word processing support.
- Performs a wide variety of general office work including filing, checking and recording information and photocopying material.
- Acts as a receptionist; answers the telephone and waits on the general public.
- Performs record keeping for various funds and expenditures.
- Compiles and maintains complex and extensive records and files; enters information in computer programs.
- Assists with special projects.
- Performs related duties as assigned.

### MINIMUM QUALIFICATIONS

#### Knowledge of:

- Organization, procedures and operating details of the section to which assigned.
- Record-keeping principles and procedures.
- Working knowledge of computer software, including word processing, spreadsheet and database programs.
- English usage, spelling, grammar and punctuation.

**Ability to:**

- Comprehend and follow instructions and make independent decisions based upon guidelines of office and supervisor.
- Communicate clearly and concisely, both orally and in writing.
- Reason logically, analyze situations accurately and adopt an effective course of action.
- Learn to operate office machines and learn office methods, rules and policies.
- Establish and maintain effective working relationships with those contacted in the course of work.

**Experience and Training:**

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

**Experience:**

No experience required, but is highly recommended.

**Training:**

Prior training in an applicable field or course of study is preferred.

**License or Certificate:**

Possession of a valid California driver's license may be required for some assignments. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

## STUDENT INTERN

### DEFINITION

Under close supervision and in a learner capacity, to assist in the performance of the administrative or technical duties related to the function and section to which assigned.

Employment in this class is restricted to students who are enrolled in a college curriculum pertinent to the department where assigned. The internship provides part-time, temporary employment for students to receive on-the-job instruction and perform work that will provide practical experience in work tasks related to their field of study. Students may have only limited or no directly related work experience and will therefore work under immediate supervision while learning job tasks. Employment as a Student Intern is based on continued enrollment in a college program.

### SUPERVISION RECEIVED AND EXERCISED

Receives supervision from a supervisory position.

### EXAMPLES OF DUTIES

Depending upon assignment, duties may include, but are not limited to, the following:

- Learns policies, procedures and techniques.
- Performs tasks that are valuable and necessary to the assigned department, such as computation, programming and analysis of data.
- Assists in research, analysis, review and other related activities in the department.
- Gains practical experience in the professional or technical field of study.
- Maintains a variety of statistical records; checks and tabulates statistical data; prepares simple statistical reports.
- Performs related duties as assigned.

### MINIMUM QUALIFICATIONS

#### Knowledge of:

- English usage, spelling, grammar and punctuation.
- Working knowledge and experience with computer software and hardware to utilize word processing, spreadsheets and databases.

#### Ability to:

- Communicate clearly and concisely, both orally and in writing.
- Learn to operate office machines and learn office methods, rules and policies.
- Establish and maintain effective working relationships with those contacted in the course of work.

**Experience and Training:**

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

**Experience:**

No experience required.

**Training:**

Interns must be enrolled in relevant subject courses in an undergraduate or graduate program.

**License or Certificate:**

Possession of a valid California driver's license may be required for some assignments. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.