



**INVESTMENT PLANS ASSISTANT I  
INVESTMENT PLANS ASSISTANT II  
INVESTMENT PLANS TECHNICIAN**

FC: CF 200, CF 201, CF 202  
PG: CLK III, CLK IV, OT  
FLSA: Non-Exempt

PC: 021, 031, 036  
BU: 09(NR)  
Created: April 2003  
Revised: July 23, 2007

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

**DEFINITION**

Under general supervision, performs a variety of comprehensive administrative and/or technical functions and provides responsible office assistance in support of the BART Investment Plans Committee; and performs related work as assigned.

**CLASS CHARACTERISTICS**

This class series provides specialized administrative and customer service support duties to the Investment Plans Committee working within the Benefits section of the Human Resources Department. While the primary work is administrative/clerical in nature, positions in this class require substantial administrative expertise and apply extensive and para-professional knowledge of principles and practices of investment plans, and extensive knowledge of the Investment Plan Committee and District policies and procedures. Additionally, incumbents assist and support the professional staff with assignments and projects on a regular basis and resolve problems that have a significant impact on the overall goals and activities of the department.

**REPORTS TO**

These positions report to the Principal Personnel Analyst in the Benefits Section of the Human Resources Department.

**Investment Plans Assistant I**

This is the journey level class in the Investment Plans Assistant series, fully competent to perform a variety of administrative duties. At this level guidelines and supervision are readily available in order to make decisions in non-routine circumstances. This class is distinguished from the Investment Plans Assistant II in that the latter functions independently and performs the full range of duties related to the Investment Plans Committee work.

## **Investment Plans Assistant II**

Employees within this class independently perform the full range of duties as assigned.

The work may be complex or difficult and require specialized knowledge, skills and the use of independent judgment. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise, and are fully aware of the operating procedures and policies of the work unit. This class is distinguished from the Investment Plans Technician in that the latter performs specialized administrative and customer services support duties and possesses specialized technical expertise and applies extensive knowledge of the principles and practices of a specialized field and functions with minimal supervision.

## **Investment Plans Technician**

This class serves as a bridge between administrative support class and the professional Personnel Analyst series. The employee in this class performs the full range of duties assigned with minimal direction and is fully aware of the operating procedures and policies of the Investment Plans and Benefits Office as well as the District procedures and policies. Incumbents support the professional staff and resolve problems that have a significant impact on the overall goals and activities of the Benefits section.

### **EXAMPLES OF DUTIES** - *Duties may include, but are not limited to, the following:*

1. Assists staff in a variety of professional and administrative duties; provides independent administrative work to support the Investment Plans Committee operations.
2. Provides assistance to BART employees, retirees and the Investment Plans Committee in a manner that presents professionalism and high quality customer service.
3. Processes appropriate paperwork/forms related to Investment Plan services.
4. Uses specialized knowledge to independently respond to inquiries received from employees and other department personnel.
5. Monitors office processes/activities; drafts forms and procedures and makes recommendations for process improvements.
6. Prioritizes workload; maintains a calendar of activities, appointments, meetings for office and Committee members.
7. Organizes and maintains various files for the Investment Plans Committee.
8. Types and proofreads correspondence, reports and forms from drafts, notes or briefs.

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9. Receives, processes and validates Hardship Requests, and prepares requests for Committee review and decision; prepares response letters to participants after meetings.
10. Schedules and prepares for monthly public meetings of the Investment Plans Committee.
11. Assists in planning and scheduling the annual Participant's Meeting and other special meetings as may be required.
12. Makes travel arrangements and processes expense reports.
13. Tracks the budget on a monthly basis
14. Stays abreast of new trends and innovations in the field.

## **QUALIFICATIONS**

### **Knowledge of:**

Principles and practices of administrative/clerical support for the day-to-day operation of a function or department.

The operation of standard office equipment.

Correct English usage, including spelling, grammar, and punctuation.

Basic principles and practices of administering employee enrollment in Investment Plans.

Basic principles of budget tracking using software programs.

### **Skill in:**

Researching and summarizing various materials.

Reading and interpreting rules, policies and procedures.

Composing routine correspondence from brief instructions.

Using initiative and sound independent judgment within established guidelines.

Providing administrative support to a committee.

Establishing and maintaining effective working relationships with those contacted in the course of the work.

Communicating clearly and concisely, both in written and oral form.

Operating standard office equipment.

Making accurate arithmetical calculations.

Maintaining accurate records and files.

Word processing use of graphics, merge functions, tables, spreadsheet formula.

Database Management, Mainframe Personnel Systems, Graphics, and computer based faxing experience preferred.

## **MINIMUM QUALIFICATIONS**

### **Investment Plans Assistant I**

#### **Education:**

Possession of a high school diploma, GED, or recognized equivalent.

#### **Experience:**

Two (2) years of (full-time equivalent) verifiable general clerical or office assistant experience.

### **Investment Plans Assistant II**

#### **Education:**

Possession of a high school diploma, GED, or recognized equivalent. College or business school course work in a related field is desirable.

#### **Experience:**

Four (4) years of (full-time equivalent) verifiable general clerical or office assistant experience two (2) years of investments plans experience in a public agency. Additional general clerical experience is highly desirable.

### **Investment Plans Technician**

#### **Education:**

Possession of a high school diploma, GED, or recognized equivalent. College or business school course work in a related field is desirable.

#### **Experience:**

Four (4) years of (full-time equivalent) general office clerical or office assistant experience and two (2) years of verifiable experience as an Investments Plans Assistant or four (4) years of investment plans experience in a public agency. Additional general clerical experience is highly desirable.

#### **Other Requirements (applies to all three levels):**

Must be able to move 50-pound boxes with the assistance of a handcart.

Typing accurately at a rate of 35 words per minute from printed copy.

## **WORKING CONDITIONS**

### **Environmental Conditions:**

Office environment; exposure to computer screens.

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**Physical Conditions:**

Requires maintaining physical condition necessary for walking, standing or sitting for prolonged periods of time.

**EEOC Code: 06**

**Safety Sensitive Designation: No**

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