



# Memorandum

**Date:** 04.25.14 *RE:* Personnel Committee  
April 29, 2014

**To:** Personnel Committee: Commissioners Avalos (Chair), Mar (Vice Chair) and Cohen

**From:** Cynthia Fong – Deputy Director for Finance and Administration *CF*

**Through:** Tilly Chang – Executive Director *TC*

**Subject:** **ACTION** – Recommend Adoption of the Proposed Staff Reorganization Plan and Job Classifications, and Amendment of the Prop K 2013 Strategic Plan Baseline

## Summary

The last staff reorganization plan, approved by the Transportation Authority Board in May 2007, was intended to address staff capacity issues as well as staff recruitment and retention challenges. The plan increased the agency's size from 24 to 33 full time equivalent positions (FTEs). Since then, the agency has gained two new roles: administrator of Prop AA (2010) and on April 1, the San Francisco Board of Supervisors designated the Transportation Authority as the Treasure Island Mobility Management Agency. With this designation, the Transportation Authority has five major functions, the other three being Prop K administrator, Congestion Management Agency, and Transportation Fund for Clean Air administrator. In addition, the Board's new goals for the agency, adopted in December 2013, are guiding our work program, and have already resulted in new initiatives and collaborative efforts such as Vision Zero, the Waterfront Transportation Assessment, Third Street Light Rail Phase III and 19th Avenue/M-Ocean View Phase II studies. Finally, we have concluded a review of our own operations and identified needs and ways to ease currently overloaded work programs through efficiency measures and proposed new staffing resources. This will not only enable more sustainable work practices, but also enable the agency to undertake new efforts such as launching the Neighborhood Transportation Improvement Program, and advancing our regional coordination and planning in the areas of freeway management and transit core capacity needs. To enable these changes and strategic directions, we are proposing a reorganization that would add 8 new FTEs and result in a structure with more robust succession planning and greater capacity for cross-divisional operations. The new structure will also enable more consistent and responsive communications with the Board, partner agencies and the public. The reorganization can be accomplished at an additional expense of about \$1.1 million during Fiscal Year (FY) 2014/15, were all the positions to be filled at the beginning of the FY. Our move to 1455 Market anticipated allowing for the future growth of the organization and includes sufficient space for the new positions. The approved 2013 Strategic Plan Baseline allows 6.1% of sales tax annual proceeds for sales tax administration, planning, programming and project delivery support and oversight. Adoption of the restructuring along with the proposed FY14/15 budget (which is being considered at the May 13 Finance committee) that includes a provision for the start of unsubsidized office rent, would increase that allowance to 7.9% for the next 15 years, tapering down to 1% during the last 5 years of the 30-year life of the Expenditure Plan. To put this in perspective, the net increase in the off the top allowance over the remaining 20 years of the 30-year Expenditure Plan period is about \$20.3 million and we are expecting to receive over \$2.5 billion dollars during that same timeframe. The Prop K allowance would fund about 47% of the cost of the new positions. The remaining 53% of new staff costs would be funded via discretionary grants, future Prop K appropriations, and other local funds. **We are seeking a recommendation to adopt the proposed staff reorganization plan and job classifications, and amendment of the Prop K 2013 Strategic Plan Baseline.**

## BACKGROUND

In 2004, through Resolution 04-76, the Transportation Authority implemented a staff restructuring to carry out the significantly changed mission of the organization since the passage of Prop K in November 2003, the first such restructuring since May 1991. Subsequently, through Resolutions 06-46

and 06-66, the Board approved incremental changes to the agency's infrastructure by adding two planner positions to the organization in FY2005/06. On May 22, 2007, through Resolution 07-68, the Board approved a staff reorganization plan to address staff capacity issues as well as staff recruitment and retention challenges. That plan added 9 full-time equivalent positions (FTEs), raising the agency total from 24 to 33 FTEs, a 36% increase.

The agency has five core functions:

- Local Transportation Sales Tax Administrator (Prop B in 1989, superseded by Prop K in 2003)
- County Congestion Management Agency (CMA) (1990)
- Transportation Fund for Clean Air Administrator (1992)
- Prop AA Vehicle Registration Fee Administrator (2010)
- Treasure Island Mobility Management Agency (TIMMA) (2014)

Since the 2007 staff reorganization plan was adopted, the Transportation Authority has acquired two new core roles as Prop AA administrator and most recently as TIMMA. These new agency functions, combined with new goals and directions adopted by the Board in December 2013 are driving new approaches and initiatives on top of an already over-extended work program, given existing staffing resources.

We have reviewed our current production capacity in light of our current work program, as well as new and emerging Board priorities. The purpose of this memorandum is to present the proposed staff reorganization intended to address these issues, and to seek a recommendation for adoption.

## **DISCUSSION**

There are a number of important factors necessitating the proposed organizational restructuring at the Transportation Authority, which can be categorized into three main groups: responding to the agency's new goals and responsibilities, the need to address existing workload management issues, and retention and succession planning. The main factors are discussed below.

**New Goals and Responsibilities:** In December 2013 the Board adopted 7 new goals for the agency (see Attachment 1), to guide the agency as the new Executive Director, hired in October 2013, assumed the organization's leadership. These have already resulted in new initiatives and collaborative efforts such as Vision Zero, the Waterfront Transportation Assessment, Third Street Light Rail Phase III and 19<sup>th</sup> Avenue/M-Ocean View Phase II studies. Other efforts that are consistent with Board direction, and our recently adopted San Francisco Transportation Plan, but which are not in our FY14/15 work program due to staffing constraints, include advancing our regional coordination and planning in the areas of freeway management and transit core capacity coordination. At the neighborhood level, we are also developing a new Neighborhood Transportation Improvement Program (NTIP) to ensure a pipeline of projects in every district. In addition, early this month, the Board designated the agency as TIMMA, which is charged with planning, constructing and operating a comprehensive mobility management and tolling program to support new housing and mixed use development plans for Treasure Island. These new roles and efforts require more staffing and new ways of operating that are driving organizational changes across the agency.

**Existing Workload Management Needs and Issues:** We have concluded a review of our workload management needs and identified a combination of efficiency and effectiveness measures which involve

technology upgrades and rationalized use of consultants, but which also point to the need for increased staffing resources. Over the past seven years, our agency work program and the tasks therein have continued to grow in number and complexity. For instance, similar to other CMAs in the region, we have taken on expanded coordination, fund programming and planning roles in response to landmark statewide climate legislation that is driving transformative changes in policy, funding, planning and project delivery at the state and regional levels. This has resulted in our assuming greater responsibility for administering and providing assistance to San Francisco sponsors for new and increasingly complicated fund programs (e.g., OneBayArea Grant, Active Transportation Program); engaging in a significantly higher level of coordination (especially land use policy) related to the regional transportation plan and sustainable communities strategy (Plan Bay Area) resulting from aforementioned new state requirements; and significantly increasing staff support for our Board members serving on regional committees such as the Metropolitan Transportation Commission, Bay Area Air Quality Management District and Association of Bay Area Governments. In addition, we have taken on additional lead agency roles such as for the I-80/Yerba Buena Island Interchange Improvement and Folsom Off-Ramp Realignment projects, and we are also providing increased procurement and administrative assistance and project management support for partner agencies. We are continuously prioritizing our efforts, and have begun streamlining initiatives in multiple divisions, but find that the many roles and functions of the agency necessitate greater staffing resources and new ways of doing business (greater cross-divisional staffing, more standardized policies and procedures) in order to maintain the agency's effectiveness.

**Retention and Succession Planning:** The Transportation Authority has also been challenged by recruitment and retention issues, which have intensified over the past several years, as our current talented staff members are aggressively recruited by other public agencies and private sector firms, some of whom offer more balanced workloads and lifestyles. Succession planning has also been a concern across the Transportation Authority, as ambitious and highly skilled employees and prospective candidates choose to accept offers from larger public agencies and private sector firms who provide a promotional ladder and clear career path to management positions, in some cases even tailoring career paths to the individual candidates. A review of our own organizational structure revealed missing promotional opportunities and succession paths, inadequate management capacity to mentor and train staff, and operational decision-making bottlenecks that hinder development of our staff and which threaten the long-term sustainability of the organization.

There is no question of the urgency to restructure the organization, and it is imperative to have staff in place to deal with the growing responsibilities of the agency. In order to continue to function effectively we must ensure that we can recruit and retain the breadth and depth of technical and professional expertise necessary to advise the Board, to more effectively engage the community, and to make strategic decisions that ensure that Prop K and Prop AA leverage their full potential.

**Proposed Structure:** We are proposing a number of significant changes to the Transportation Authority's organizational structure. The overall picture is provided in the proposed agency structure and function chart in Attachment 2. New and revised job classifications, which have been developed with the assistance of Koff & Associates, the agency which conducted our most recent compensation survey, are included in Attachment 3.

All positions use the currently proposed job classification structure, pursuant to the official salary survey of comparable positions adopted by the Board in May 2013 (Resolution 13-50). We are proposing a total of eight new positions. The proposed staffing plan will add eight FTEs to the existing 33 FTEs, which is a 24% increase, compared to the 36% increase in 2007 for the addition of 9 FTEs.

**Changes in the Executive Director's Office:** The Executive Director's office is responsible for directing the agency, for the development of the annual emphasis areas and plans, and for the efficient management of staff to accomplish assigned and established work products and goals. The Executive Director's office is responsible for regular and effective communications with the Board, the Mayor's Office, and San Francisco's elected representatives at the state and federal levels; for coordination and partnering with other city agencies, regional, state and federal agencies, and other CMAs. In this 25<sup>th</sup> Anniversary year of the agency, the Executive Director's office anticipates leading special commemorative activities to highlight major Prop K accomplishments and program management activities. The Executive Director's office is also responsible for general external communications, including community and press relations and advocacy issues – a function for which the agency currently has no dedicated staff. The proposed reorganization would add one FTE for a Senior Communications Officer who would oversee the Senior Graphic Designer, which currently is part of the Technology, Data and Analysis Division.

**Changes in the Finance & Administration Division:** This division will receive three FTEs in recognition of how under-resourced this division is compared to the significant increase in the number of different grants and other external revenues sources contained in the agency's budget; the complexity of supporting major capital projects such as the Yerba Buena Island Ramps project, for which the Transportation Authority is the lead; increased frequency of leading procurements for other agencies; and a bigger demand for human resources and administrative support as the agency has grown in size. The new positions (Principal Management Analyst, Staff Accountant and Administrative Assistant) also address retention issues and support division succession planning. The cost of these additional positions would be partially offset by a reduction in the use of temporary staff to assist this division.

**Changes in the Policy & Programming Division:** An important component of the proposed organization structure is the incorporation of Assistant Deputy Director designations in the Policy and Programming and Planning Divisions with staff management responsibilities in each of the divisions, to aid in recruitment, retention and succession planning efforts. These designations do not add staff, but provide a needed additional level between the Principal Planner and Deputy Director position in these divisions. In addition, our reorganization plan also increases the staffing levels of the Deputy Director for Policy and Programming and the Chief Deputy Director positions, as a reflection of the workload demands and strategic roles of these two key positions.

No additional staff positions are proposed for this division, but the division will benefit by the added resources in the Finance and Administration Division and by the addition of the Senior Communications Officer discussed above. This will help free up capacity for the Policy & Programming Division to sustain recently ramped up Board support (e.g. for Vision Zero Committee and staffing of regional meetings), increased Plan Bay Area coordination both in the City and with regional partners, and for new/expanded roles responsibilities such as development and implementation of the new NTIP.

**Changes in the Planning Division:** In addition to incorporating a new Assistant Deputy Director designation (see Policy and Programming Division for details), this division would receive 2 FTE: a Senior Transportation Planner and a Transportation Planner. The additional staff resources will help to address a chronically very full work plan, which current has resulted in some work being delayed and/or in higher costs by needing to rely on consultant project managers rather than in-house staff. The additional staffing will also help as the division takes on new responsibilities with Vision Zero and NTIP, in coordination with the Policy and Programming Division, and initiates an intense planning phase to deliver the Treasure Island Transportation Implementation Plan as the recently designated

TIMMA. As other planning efforts ramp down, this division, in coordination with the Technology, Data and Analysis Division, will be taking on multi-agency, multi-jurisdictional planning efforts related to freeway management and transit core capacity needs – two high priority follow-up areas identified in the San Francisco Transportation Plan.

**Changes in the Technology, Data and Analysis Division:** The division, formerly titled Technology Services, serves as the research and development and travel demand modeling lead for the agency and works to support the analytical needs of numerous other city and regional agencies and development projects, as well as for studies and efforts led by the Transportation Authority. It also supports agency-wide information technology needs. This division, which has earned national recognition for innovative advances in travel demand forecasting and development of the CycleTracks application, will receive one FTE. The addition of a Senior Transportation Planner will help the division be more responsive to internal and external clients, and enable more dedicated resources for model development and data analysis to better support transportation planning needs in the City.

**Changes in the Capital Projects Division:** The division will continue to focus its oversight efforts on the delivery of the Prop K major capital projects, such as the Presidio Parkway, the SFMTA's Central Subway, and the Caltrain Downtown Extension/Transbay Terminal (Transbay Transit Center) and providing engineering support and/or project management, in close collaboration with the Planning Division, for many of the agency's planning efforts such as conceptual engineering and environmental clearance of the Geary Corridor Bus Rapid Transit Project, 19<sup>th</sup> Avenue Bus Bulb Project, and Quint Street Connector Road. It will also oversee the system design and development of the concept of operations for the TIMMA through close collaboration with the Planning Division. The division will also lead the construction phase of the Folsom Off-Ramp Realignment Project for the Office of Community Investment and Infrastructure and the Yerba Buena Island Ramps Improvement project for Treasure Island Development Authority. One FTE for a Senior Engineer will be added primarily to provide increased in-house (versus consultant) support for various planning and project development efforts as they move from the planning stages to the design and implementation stages, whether led by the Transportation Authority or by other agencies.

**Cost and Funding:** The entire reorganization can be accomplished at an additional expense of about \$1.1 million during Fiscal Year (FY) 2014/15, were all the positions to be filled at the beginning of the FY. Personnel cost would now represent 3.1% of total expenditures for the agency, an increase of .4%. We propose funding about 47% of the cost of the 8 new positions with an increase in the Prop K off the top allowance for planning, programming, project delivery support and oversight, and administration (discussed further below) and the remaining 53% via discretionary grants, future Prop K appropriations, or other local funds. Positions would be filled dependent upon securing funding.

The approved 2013 Prop K Strategic Plan Baseline allows 6.1% of sales tax annual proceeds for sales tax planning, programming, project delivery support and oversight and administration. Our move to 1455 Market Street anticipated allowing for the future growth of the organization and includes sufficient space for the proposed 8 new positions. Our recommended increase to the Prop K off the top allowance is intended to cover both the increase in rent (about \$261,056 in FY 2014/15) and 47% of the cost of the new positions. Adoption of the proposed organizational restructuring would increase the 6.1% allowance to 7.9% (adding 1.5% for new personnel costs and 0.3% for rent) for the next 15 years, tapering down to 1% during the last 5 years of the 30-year life of the Expenditure Plan, without violating statutory limits. Table 1 below shows the proposed off the top allowance increase:

**Table 1. Proposed Prop K Off the Top Allowance**

<b>Fiscal Year(s)</b>	<b>Percent Off the Top of Net Revenues</b>
2003/04 - 2006/07	4.0%
2007/08 - 2012/13	6.1%
2013/14 <sup>1</sup>	6.7%
2014/15 <sup>2</sup>	8.2%
2015/16 - 2028/29	7.9%
2029/30	2.5%
2030/31 - 2033/34	1.0%

<sup>1</sup>Fiscal Year 2013/14 Board approved annual budget includes a one-year increase for .6% for procurement and launch of a new Enterprise Resource Planning/Accounting (ERP) system.

<sup>2</sup> Fiscal Year 2014/15 proposed annual budget includes a one-time increase of .4% for the final tranche of one-time costs for the procurement and launch of a new ERP system.

To put the proposed restructuring (including rent) in perspective, the net increase in the off the top allowance over the remaining 20 years of the 30-year Expenditure Plan period is about \$20.3 million and we are expecting to receive over \$2.5 billion dollars during that same timeframe. Through the Strategic Plan update that is underway, we are continuing to work with sponsors to maximize funds for projects by providing funding strategy assistance to better leverage Prop K funds and to carefully manage program cash flow to minimize financing costs.

**We are seeking a recommendation to adopt the proposed staff reorganization plan and job classifications, and amendment of the 2013 Prop K Strategic Plan Baseline.**

**ALTERNATIVES**

1. Recommend adoption of the proposed staff reorganization plan and job classifications, and amendment of the 2013 Prop K Strategic Plan Baseline, as presented.
2. Recommend adoption of the proposed staff reorganization plan and job classifications, and amendment of the 2013 Prop K Strategic Plan Baseline, with modifications.
3. Defer action, pending additional information or further staff analysis.

**CAC POSITION**

The CAC does not take action on personnel matters.

**FINANCIAL IMPACTS**

Adoption of the Assistant Deputy Director positions for the job classification structure does not have immediate budgetary implications because salary increases are only granted for performance, not for inflation or as blanket increases for cost of living expenses. Range adjustments, as well as funding for new positions, are subject to the Transportation Authority’s annual budget approval process.

The proposed FY 2014/15 budget, to be reviewed by the Finance Committee next month, does not

include the cost of the additional positions proposed as part of this restructuring. If the Board approves the restructuring, we would bring a FY 2014/15 budget amendment to the Board that reflects the addition of those positions we anticipate needing and being able to fill with identified funding during this fiscal year.

## **RECOMMENDATION**

Recommend adoption of the proposed staff reorganization plan and job classifications, and amendment of the 2013 Prop K Strategic Plan Baseline, as presented.

### Attachments

1. Agency Objectives for 2014 (Resolution 14-42, Adopted 12.17.13)
2. Proposed Agency Structure and Functions chart
3. Job Descriptions



**Objectives for 2014**  
**for**  
**Tilly Chang, Executive Director**

The purpose of this section is to establish tangible parameters against which the Board may be able to assess the Executive Director's performance during Fiscal Year 2013/14:

**1. Advance Key Work Program Activities.**

- a. Adopt and begin implementation of the San Francisco Transportation Plan (SFTP), Early Action Program (Prop K 5-Year Prioritization Programs) and 2013 Prop K Strategic Plan;
- b. Continue to work with city and regional agencies to deliver the Prop K Expenditure Plan, providing oversight, funding strategy and project delivery support as needed;
- c. Produce the Geary BRT EIR/EIS;
- d. Advance construction of Presidio Parkway and Yerba Buena Island Ramps Improvement Project;
- e. Work with lead agencies and key stakeholders to strengthen funding strategy, project delivery approach and readiness of Caltrain Electrification and Downtown Extension;
- f. Launch new Neighborhood Transportation Improvement Program (NTIP) based on Board input, and
- g. When designated by TIDA, establish the Treasure Island Mobility Management Agency (TIMMA) and establish bylaws, etc. to establish the new agency.

In addition, support ongoing agency efforts to maximize capture and retention of discretionary funds for San Francisco (e.g. support OBAG implementation, provide technical assistance to sponsors with state and federal grant obligation and timely use of funds); refine capital project reporting to improve effectiveness and accessibility, tailoring approach for both major capital projects and neighborhood projects; implement improvements to the San Francisco Travel Demand Model and related applications to support San Francisco transportation and land use planning, project development and performance monitoring; and support legislative and other advocacy to advance agency and city priorities. Refine the debt issuance strategy for the Authority, consistent with the adopted Prop K Strategic Plan; strengthen mechanisms to evaluate project readiness and program deliverability status as a crucial input into debt issuance decisions; and pursue opportunities to leverage the Authority's bonding capabilities to support financing of projects within the SFTP and Prop K Expenditure Plan.

**2. Board Support, Project Reporting and Consultation.**

- a. Provide staff support, research, advice for Board requests and continue to seek Board input on strategic agency priorities and direction;



- b. Help staff regional transportation-related roles (e.g. MTC, ABAG, Air District, Caltrain); and
- c. Support advancement of the Neighborhood Transportation Improvement Program (NTIP) capital priorities, administer NTIP planning grant program in each district, and as requested lead specific NTIP planning efforts in coordination with relevant city agencies.

### **3. Promote Efficiency and Customer Service.**

- a. Implement the agency's new Enterprise Resource Planning System (ERP) to enable more efficient and sophisticated financial data reporting and analysis, consolidate other information systems, and enable data integration with the grants Portal and other key systems; Continue to enhance the Prop K Portal functionality (e.g. allow paperless amendment requests, electronic signatures);
- b. Revise grants administration procedures to reduce administrative burden for Transportation Authority and sponsor staff while maintaining transparency and accountability (e.g. simplify invoice procedures, revamp allocation request forms, explore delegated allocation authority with the Board for designated projects identified in Board-adopted 5-Year Prioritization Programs).
- c. Increase capacity to respond to data requests through the travel model service bureau and invest in data organization and standardization activities with the SF Planning, SFDPW, SFMTA, SFDPH, SFMOI, and SF Environment.

### **4. Coordinate and Collaborate with Partner Agencies.**

- a. Coordinate with the Mayor's Office and City department heads on joint initiatives to improve capital project planning, project management and delivery;
- b. Enhance partnering with SFMTA and work with all partner agencies to clarify roles and responsibilities particularly at the start of collaborative efforts; and
- c. Collaborate on plans and projects with other agencies (e.g., Better Market Street, Waterfront Transportation Assessment, Bike Share, and Plan Bay Area implementation).

### **5. Provide Leadership at Regional/State Levels.**

- a. Coordinate the City's efforts and lead the development of policy-level strategy and legislation to identify new or expanded regional, state and federal revenues for all transportation project categories and transit operations, to further leverage Prop K funds and implement SFTP policies and recommendations;
- b. Work in collaboration with San Francisco agencies and other stakeholders, continue to be a leader in Plan Bay Area implementation and policy formation, promoting performance-based criteria for regional infrastructure funding decisions through the Sustainable Communities Strategies and participating in shaping the new federal surface transportation act to position San Francisco's transportation program favorably; and
- c. Play a lead role in advancing capital projects of regional significance (e.g. Downtown Extension of Caltrain, Freeway Performance Initiative, Long Range Transit Network Studies) while helping to shape San Francisco's comprehensive approach to transportation system management in the South of Market Area.

**6. Build Awareness of SFCTA Programs and Opportunities.**

- a. Define and implement a comprehensive and strategic agency-wide multi-media communications approach and staffing plan to strengthen public engagement, outreach, press relations and intergovernmental relations capabilities;
- b. Develop and enhance interactive and innovative public engagement tools including the MyStreetSF.com interactive map, and out www.sfcta.org website; and
- c. Continue to promote DBE/LBE/SBE participation for contractors and consulting firms.

**7. Agency/Staff Development.**

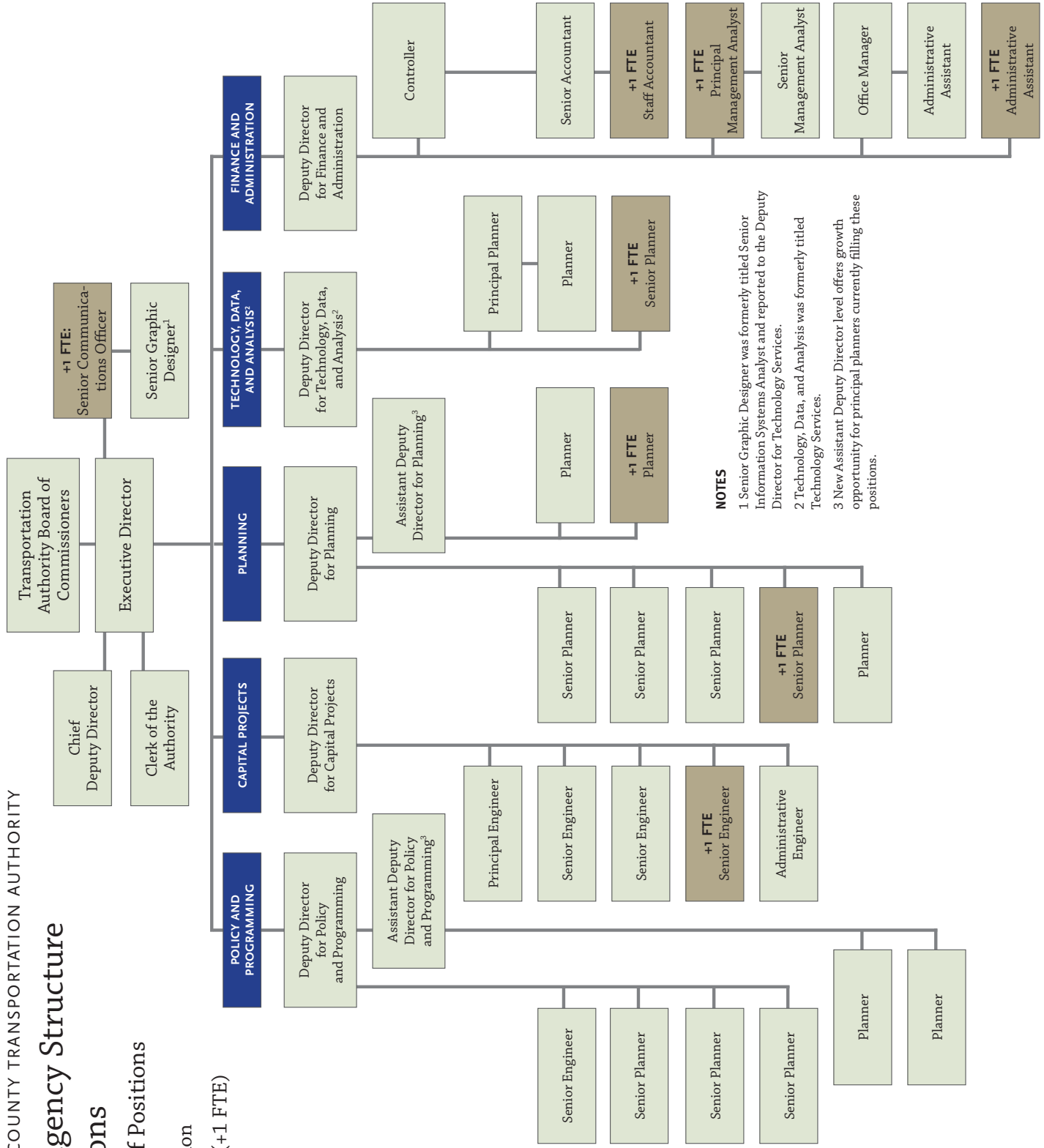
- a. Continue to attract and retain staff by improving training programs and better aligning agency staffing with work program objectives;
- b. Strengthen agency procedures and core systems in keeping with operational objectives, including updates to internal policies, procedures and core management and information systems; and
- c. Initiate development of a succession plan by division.

# Proposed Agency Structure and Functions

+8 FTE, 41 Staff Positions

Existing position

New position (+1 FTE)



**NOTES**

- 1 Senior Graphic Designer was formerly titled Senior Information Systems Analyst and reported to the Deputy Director for Technology Services.
- 2 Technology, Data, and Analysis was formerly titled Technology Services.
- 3 New Assistant Deputy Director level offers growth opportunity for principal planners currently filling these positions.



# Job Description

OFFICE OF THE EXECUTIVE DIRECTOR

## SENIOR COMMUNICATIONS OFFICER

**Reports to:** Executive Director

**Employment Status:** Exempt/Regular

### SUMMARY

The Senior Communications Officer assists the Executive Director with designing, planning, and implementing the Transportation Authority's agency-wide communications including marketing, media relations, and public relations projects and programs. Under direction of the Executive Director, the Senior Communications Officer leads communications initiatives including integration and maintenance of agency communications assets, and supports all divisions and project-level public outreach activities.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

#### Strategic Communications:

- Provides communications and messaging support to Board and Transportation Authority management team, in conveying the mission, goals and role of the agency to the public.
- Develops and leads implementation of the Transportation Authority's communications plans and policies, including branding, messaging and operating standards and protocols. Liaise with Board leadership, coordinate with partner agencies and community organizations and engage staff in initial plan development and subsequent updates and revisions.
- Assists the Executive Director in the development and dissemination of key messages for the Transportation Authority; plans and develops paper and electronic publications and other communications materials, including talking points, brochures, newsletters, annual reports, press releases, advertisements, and publications; oversees design, production, printing, and distribution of all print and electronic materials.
- Provides review and leads quality control for key agency materials, reports, and communications.
- Establishes and develops new avenues of communication with the general public and community groups; develops methods, techniques, and materials to establish and maintain ongoing communication and cooperation with community organizations and associations served by the Transportation Authority, including ethnic and low-income or other hard-to-reach groups.

#### Community and Media Relations:

- Oversees development of agency-wide communications initiatives including marketing, media relations, community engagement programs and special events.
- Oversees development and maintenance of all major agency communications assets including agency website and social media sites, marketing materials, and outreach and contacts databases.
- Builds and maintains relationships with media and editorial contacts; manages media list; responds to media inquiries and manages consultants and Transportation Authority staff as needed. Includes traditional as well as new/social media and ethnic and neighborhood level outlets and organizations.

- Builds and maintains relationships with agency partners and stakeholders including a broad range of civic, neighborhood and advocacy organizations.

**Agency Operational Support:**

- Provides communications guidance and support to Transportation Authority staff and project managers; reviews major deliverables and outreach materials; researches and advises on emerging and innovative outreach and public involvement techniques applicable to planning or project development activities; and facilitate staff training as needed.
- Supports management team and Clerk of the Board in management of the Transportation Authority’s Board operations, agency work program and special projects; provide support to Clerk or project managers in communicating with the agency’s various Citizens Advisory Committees; assist with responses to public information requests and inquiries.
- Serves as project manager for special projects as assigned; prepares staff reports, memos, and presentations for Executive Director and Board review.
- Supports management team and Policy and Programming Division with legislative and government affairs as needed.
- Performs other tasks as required and assigned.

**Supervisory Responsibilities:** Supervises the Senior Graphics Designer. May supervise temporary staff, interns and external consultant teams.

**MINIMUM QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills, abilities, training, and experience required of this job.

**Training and Experience:** Completion of a bachelor’s degree in appropriate disciplines such as Public Relations, Communications, Business Administration or a closely related field from an accredited university is required. Five (5) years of progressively responsible experience in coordinating communications and marketing, media relations, and/or community outreach programs. At least two (2) years must be in a supervisory or managerial role. A master’s degree in one of the appropriate fields may substitute for two years of the required experience. An equivalent combination of education and experience is acceptable.

**Knowledge:** Knowledge of principles and practices of communications and marketing, media relations, and community engagement program goal setting, development, implementation, and evaluation; practices of researching program issues, evaluating alternatives, making sound recommendations, and preparing and presenting effective staff reports; principles, practices, and techniques used in conducting effective communications and marketing, media relations, and community outreach programs in a public agency; principles, methods, and techniques of marketing communications and public speaking; basic principles and practices of graphic design and print production, including an understanding of design concepts and applications; familiar with media communications and general publications, media relations and pitching techniques used in initiating and maintaining media relationships; recent and ongoing developments, current literature, and sources of information related to communications and marketing, media relations, and community outreach; basic principles and practices of budget development, administration, and accountability; principles, practices, and techniques in using social media tools and applications.

**Skills and Abilities:** Strong public presentation skills and public speaking for a wide variety of audiences, including elected officials, the public and technical staff; advanced writing and editing skills for a variety of

communications media, including memoranda, reports, resolutions, plans, and outreach materials; basic design and graphics expertise; strong project, program, and relationship, stakeholder and crisis management skills, including consultant contract oversight; ability to work effectively under stressful situations involving tight deadlines as well as confrontation and conflict; plan, research, organize, coordinate, and implement a variety of communications and marketing, media relations, and community outreach related activities and programs; effectively represent the Transportation Authority in meetings with the general public, community groups, organizations, other governmental agencies, and professional, regulatory, and legislative organizations; develop effective communications and marketing, media relations, and community outreach strategies and campaigns; establish and maintain relationships with diverse groups of different media outlets, citizen groups and individuals, organizations, associations, and appropriate governmental bodies; operate modern office equipment including computer equipment and specialized software applications.

**Physical Demands and Work Environment:** The physical demands and work environment are characteristic of modern office work and include moderate noise (examples: business office with computers and printers, light traffic), and are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Ability to travel on occasion.

**Employment Status:** *Full-Time, Exempt.* An employee in this position is not subject to the minimum wage and overtime requirements of the Fair Labor Standards Act and is regularly scheduled to work 40 hours a week.

**Annual Compensation Range: \$93,168-\$125,772.....Adopted xxx xx, 20xx  
Resolution xx-xx**



# Job Description

## OFFICE OF THE EXECUTIVE DIRECTOR

## SENIOR GRAPHIC DESIGNER

**Reports to:** Senior Communications Officer

**Exemption Status:** Full-Time, Exempt

### SUMMARY

Under the general direction of the Senior Communications Officer, the Senior Graphic Designer is responsible for the development, implementation, and coordination of a wide variety of creative and complex graphic artwork for public information and promotional materials, website design and maintenance, and multi-media communications. Projects include agency reports and fact sheets, document and email templates, branding implementation, signage, social media posts, web site design and maintenance, email newsletters and list maintenance, map templates, maintenance of the agency photo library, direct mail collateral, flyers, maps, posters, print ads, banners, slide presentations, displays, brochures, stationery, photography and photo correction, and specialty items. The duties specified below are characteristic of the range of duties and responsibilities assigned to this position, and are not intended to be an inclusive listing.

### ESSENTIAL DUTIES AND RESPONSIBILITIES

- Develops, implements, and coordinates a wide variety of creative and complex graphic artwork for public information and promotional materials.
- Maintains consistent agency branding across all projects.
- Organizes and designs agency publications, including reports, fact sheets, and other collateral material, and makes editorial suggestions to improve and clarify the headline/body copy.
- Plans, designs, lays out, and creates visual elements for document and email templates, direct mail collateral, flyers, maps, posters, print ads, banners, brochures, and other marketing and public information materials, requiring research and interpretation of subject matter, from concept to delivery of materials.
- Coordinates design projects with vendors such as outside designers, photographers, illustrators, and other agencies.
- Coordinates printing of publications, selecting paper stock, printing and binding methods, and print vendors.
- Designs and maintains agency website content and development of new web, social media, and multi-media capabilities in coordination with the Deputy Director for Technology, Data, and Analysis.
- Designs, coordinates, and art directs the production of signage, exhibits and displays.
- Recommends methods of visual presentations including theme, style, and format.
- Designs, maintains, and supports a standard set of document, presentation, and map templates.
- Consults with other Transportation Authority staff requesting artwork to discuss preferences, methods of production, budgetary, scheduling, and production requirements.

- Maintains agency photo library, obtains photography from various outside sources, photographs projects and other subjects as necessary; manipulated images as necessary.
- Prepares, updates, converts files into various formats, and distributes files to clients, vendors, and outside agencies as directed.
- Develops in-house and on-call capabilities for graphic design and multimedia materials production, for outreach and agency publications.
- Requests bids from graphics and printing companies, prepares projects for printing, and follows through for quality control (e.g., color evaluation, press checks).
- Manages email newsletters and list maintenance.
- Maintains current knowledge of new methods, tools and equipment and related developments in the field of graphic production and design, including computer and graphics systems; provides recommendations to management on purchase of new programs and/or equipment.
- Performs related duties as required and assigned.

**Supervisory Responsibilities:** May supervise interns and external consultant teams.

## **MINIMUM QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills, abilities, training and experience required of this job.

**Training and Experience:** Completion of a baccalaureate degree in graphic design or a related field and; five (5) years of progressively responsible experience in producing graphic design for publication and the web, including production planning or closely related experience, that demonstrates the knowledge and ability to assume responsibility for most if not all of the graphic production cycle. An equivalent combination of education and experience is acceptable.

**Knowledge:** Knowledge of art materials, equipment including various types and uses of paper and inks, bindery methods, and post office requirements; principles and practices of photography; printing processes for multi-color, multi-page publications; operation of Apple and Windows computers and graphic software, including: Adobe Creative Suite; Microsoft Word and PowerPoint; advanced understanding of web design principles and basic understanding of HTML, JavaScript, and content management systems including Drupal; operation of point-and-shoot digital cameras; marketing and public information materials, production planning, and coordination; principles and contemporary practices of the design of graphic publications and production techniques including new technology development; effective graphic design advertising techniques of visual presentations, layout, and typography; good customer service skills; excellent organizational and writing skills; advanced proficiency with standard computer spreadsheet, word processing, and other office administration software.

**Skills and Abilities:** Exercise creative skills in preparing a wide variety of creative and complex graphic artwork for public information and promotional materials; plan, design, lay out, and create visual elements for marketing and public information materials, requiring research and interpretation of subject matter, from concept to delivery of material; ability to maintain consistent agency branding across all projects; recommend methods of visual presentations including theme, style, and format; work independently and creatively; organize and handle multiple projects simultaneously; design, coordinate, and art direct the construction of signage, exhibits and displays; design page layouts for multi-color, multi-page publications, booklets, and reports; prepare a variety of technical art work such as map templates to illustrate planning concepts; consult with staff, employees, and other departments requesting artwork to discuss preferences,



methods of production, budgeting, scheduling, and production requirements; make editorial suggestions to improve and clarify headline/body copy; design and lay out publications, reports, and fact sheets, requiring decisions on paper stock, printing and binding methods, and print vendors; design and update website content and web page templates; coordinate design projects with vendors such as outside designers, photographers, illustrators, sign-makers, and other agencies, and prepare printing and production specifications for print vendors; operate digital cameras and download, store, and manipulate images; adhere to budgets for all design projects; estimate production costs, and determine design, colors and graphics in accordance with expenditure and scheduling limitations; art direct photo shoots and attend press checks to ensure the project specifications are adhered to properly before project delivery; research and keep current on new materials, methods and techniques of production and equipment as related to graphic design, printing, presentations, computer graphic hardware and software, website design, and content management system management; communicate clearly and effectively, both orally and in writing; establish and maintain cooperative working relationships with those contacted in the course of business; summarize and present technical data and prepare written reports and recommendations; speak effectively and write clearly and concisely. Ability to exercise tact and courtesy in working with members of the public, professional and technical colleagues, and elected officials.

**Physical Demands and Work Environment:** The physical demands and work environment are characteristic of modern office work and include moderate noise (examples: business office with computers and printers, light traffic), and are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Ability to travel on occasion.

**Employment Status:** *Full-Time, Exempt.* An employee in this position is not subject to the minimum wage and overtime requirements of the Fair Labor Standards Act and is regularly scheduled to work 40 hours a week.

**Annual Compensation Range: \$71,004-\$95,856..... Adopted xxx  
Resolution xx-xx-**



# Job Description

## FINANCE & ADMINISTRATION DIVISION

### PRINCIPAL MANAGEMENT ANALYST

**Reports to:** Deputy Director for Finance and Administration

**Exemption Status:** Full-Time, Exempt

#### SUMMARY

The Principal Management Analyst plans, organizes, leads complex, sensitive, and detailed analytical work in the areas of financial/fiscal, legislative and administrative policy and/or contract administration. Under the general direction of the Deputy Director for Finance and Administration, the Principal Management Analyst performs the duties and responsibilities listed below, which are characteristic of the range of duties and responsibilities assigned to this position, and not intended to be an inclusive listing.

#### ESSENTIAL DUTIES AND RESPONSIBILITIES

- Provides administrative analysis to the Deputy Director for Finance and Administration.
- Manages the activities related to the application for, and management of, multiple source capital projects and/or grants; manages reporting to funding agencies with project managers and Controller.
- Plans and reviews economic and/or financial analyses including forecasting, revenue and/or expense projections, analysis of capital requirements, calculation of debt capacity, evaluation of financing alternatives; rate analysis, modeling and cost/benefit analysis; prepares reports with financial/policy recommendations and appropriate supporting documentation; may assist in the review of audit schedules and financial statements.
- Analyzes existing and proposed administrative policies and procedures as well as organizational problems; conducts difficult and detailed studies; identifies administrative problems, determines methods of analysis, and identifies trends; prepares and presents reports with recommendations and appropriate justification based on studies and surveys; may coordinate the implementation of new systems and/or procedures.
- Manages all activities related to contracting. Reviews cost estimates and terms for new and existing contracts, for proposed change orders and modifications; reviews contract provisions, and meets with project and program managers to develop cost estimates; meets with contractors to negotiate requests for additional costs; assists in analyzing costs related to change orders and modifications; maintains data and information resources on current industry cost standards for materials, equipment and labor costs; establishes and maintains contact with sources of information including vendors, consultants and governmental agencies.
- Reviews and conducts competitive contract vendor selection, conforming to Transportation Authority procurement and contracting policies, including public bids and requests for proposals; distributes and places advertisements and public notices for contracts; processes highly complex contracts including advertising for bids/proposals, receipt and review of bids, contract negotiation and award, and routing through signature/documentation process to certification; provides information and training and

technical assistance to staff and contractors on Transportation Authority contracting and procurement policies, procedures and requirements.

- Manages all activities for the Transportation Authority's Disadvantaged Business Enterprise (DBE) and Local Business Enterprise (LBE) Program. Certifies DBEs and LBEs, and prepares corresponding statistics and reports.
- Prepares and presents oral and written reports, correspondence and statistical analyses. Responds to informational requests, including those of a highly sensitive nature, and may represent the Transportation Authority to the outside agencies and the public.
- Performs other tasks as required and assigned.

**Supervisory Responsibilities:** May supervise staff, interns, and consultant teams.

## **MINIMUM QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills, abilities, training and experience required of this job.

**Training and Experience:** A Bachelor's degree in Public or Business Administration, Finance, Accounting or Economics from an accredited university, and three (3) years of progressively responsible experience in complex financial/fiscal analysis, economic analysis, contract administration, or legislative/ administrative policy analysis is required. A Master's degree in one of the appropriate fields may substitute for two years of the required experience. An equivalent combination of education and experience is acceptable.

**Knowledge:** Knowledge of principles and techniques of governmental organization and management; principles and techniques of financial/fiscal analysis; principles and techniques of economic and policy analysis; principles and techniques of generally accepted accounting principles and government accounting standards; application of statistical and other analytical methods; applicable local, state, and federal laws and regulations; principles involved in the development and implementation of complex systems and procedures; methods, procedures, and techniques needed for negotiations of contract terms, change orders, cost estimates and modifications; advanced proficiency with standard computer spreadsheet, word processing, database management and other office administration software.

**Skills and Abilities:** Ability to collect, synthesize, and analyze a wide variety of information; conduct difficult analytical studies involving complex administrative and financial systems and procedures; work with authority and efficiency to identify and define problems, determine methodology, evaluate data, make recommendations with appropriate justification and develop/implement a plan of action; establish and maintain effective communication with senior management, officials, other staff, vendors, or other agencies; negotiate effectively; speak effectively and write clearly and concisely; exercise tact and courtesy in working with members of the general public; deal effectively with Board members, other government officials, professional and technical colleagues and staff.

**Physical Demands and Work Environment:** The physical demands and work environment are characteristic of modern office work and include moderate noise (examples: business office with computers and printers, light traffic), and are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Ability to travel on occasion.

**Employment Status:** *Full-Time, Exempt.* An employee in this position is not subject to the minimum wage and overtime requirements of the Fair Labor Standards Act and is regularly scheduled to work 40 hours a week.

**Annual Compensation Range: \$86,508-\$116,796.....Adopted xxx xx, 20xx  
Resolution xx-xx**



# Job Description

## FINANCE & ADMINISTRATION DIVISION

### STAFF ACCOUNTANT

**Reports to:** Senior Accountant

**Exemption Status:** Full-Time, Exempt

#### SUMMARY

The Staff Accountant assists the Senior Accountant with the Transportation Authority's payroll, accounts payable, accounts receivable, grants and cash management functions; performs cash and account reconciliation; prepares invoices used in billing federal, state and local agencies; and assists in preparing supplemental schedules to support financial statements. Under the general supervision of the Senior Accountant, the Staff Accountant performs the duties and responsibilities listed below, which are characteristic of the range of duties and responsibilities assigned to this position, and are not intended to be an inclusive listing.

#### ESSENTIAL DUTIES AND RESPONSIBILITIES

- Assists with bi-weekly payrolls and maintains pay records for staff.
- Audits and processes payments for various invoices, contracts and miscellaneous expenses, including assignment of expense coding and drafting of payment checks or vouchers.
- Consults with Transportation Authority project managers and external agency staff, and obtains and verifies information for the preparation of documents for reimbursement from various federal, state and local agencies. Prepares and submits reimbursement requests, along with required supporting documentation. Monitors outstanding billings and request payments; processes cash receipts.
- Performs bank, cash and accounts reconciliations and provides analysis of available funds as required. Prepares transfer documents to replenish operating accounts.
- Prepares justifications and makes recommendations for the adjustment of journals or transfer of entries to make revenue or expenditure corrections.
- Assists Senior Accountant in periodic financial reporting activities for Division and project managers. Assists external auditors and Senior Accountant in preparing supplemental schedules to support financial statements.
- Performs other tasks as required and assigned.

**Supervisory Responsibilities:** May supervise interns and temporary staff.

**MINIMUM QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills, abilities, training and experience required of this job.

**Training and Experience:** Bachelor’s degree in a related field such as accounting, public administration or public finance with concentration in business. A graduate degree in accounting or public finance, or a certified public accounting license can substitute for one year of the required experience, or an equivalent combination of education and experience.

**Knowledge:** Knowledge and understanding of basic accounting principles, practices, regulations and methods, including basic journal entries and preparation of bank reconciliations, as well as the financial statement reporting process; knowledge of federal, state and local procedures. Advanced proficiency with standard computer spreadsheet, word processing, database management and other office administration software.

**Skills and Abilities:** Ability to evaluate general ledger accounts; proficiency with computerized accounting systems, i.e., Fundware accounting software, or software of a similar degree of complexity; design and maintain a wide variety of statistical and narrative records and reports utilizing spreadsheet expertise; summarize and present data and prepare written reports and recommendations; speak effectively and write clearly and concisely; ability to work with professional and technical colleagues and staff.

**Physical Demands and Work Environment:** The physical demands and work environment are characteristic of modern office work and include moderate noise (examples: business office with computers and printers, light traffic), and are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Ability to travel on occasion.

**Employment Status:** *Full-Time, Exempt.* An employee in this position is not subject to the minimum wage and overtime requirements of the Fair Labor Standards Act and is regularly scheduled to work 40 hours a week.

**Annual Compensation Range: \$56,856-\$76,752 .....Adopted xxx xx, 20xx  
Resolution xx-xx**



# Job Description

## TRANSPORTATION PLANNER SERIES POLICY & PROGRAMMING DIVISION

### ASSISTANT DEPUTY DIRECTOR FOR POLICY & PROGRAMMING

**Reports to:** Deputy Director, Policy & Programming

**Exemption Status:** Full-Time, Exempt

#### SUMMARY

The Policy & Programming Division performs complex and sensitive tasks in the areas of policy, legislation, strategic financial planning, fund programming and planning; facilitates community outreach efforts; and represents the Transportation Authority on technical and policy advisory groups.

With nominal supervision from the Deputy Director, the Assistant Deputy Director performs the duties and responsibilities listed below, which are characteristic of the range of duties and responsibilities assigned to this position, and are not intended to be a comprehensive listing.

#### ESSENTIAL DUTIES AND RESPONSIBILITIES

- Develops and implements policies, procedures and funding recommendations for internally administered grant programs. Provides assistance to project sponsors (e.g. public agencies), solicits public input, and responds to inquiries from the public and other agencies.
- Develops policy and programming recommendations for federal, state, and regional fund sources. Provides corresponding project delivery support including monitoring timely use of fund deadlines; assisting project sponsors with technical, planning, and administrative issues; and performs other tasks intended to facilitate project implementation and preservation of discretionary funds for San Francisco.
- Develops policies, funding strategies and legislation to advance Transportation Authority goals and objectives, including research and analytical support, advocacy before governmental agencies and community outreach.
- Provides policy, programming and funding input into the development of the Transportation Authority's various programs and plans including, but not limited to, the Countywide Transportation Plan, the Congestion Management Program, 5-Year Prioritization Programs and Strategic Plans.
- Negotiates and resolves complex funding issues and policy challenges with federal, state, and regional transportation funding agencies and San Francisco project sponsors. Leads or assists in the development and negotiation of agreements with other agencies, as required by the Deputy Director for Policy & Programming.
- Manages internal planning studies, provides policy and technical input, and leads community involvement efforts. Reviews and comments on external planning efforts.
- Maintains contacts with peers from federal, state, and regional agencies, including project sponsor and funding agencies, and staffs of elected local, regional, state and federal officials.
- Prepares Board memoranda and official Transportation Authority correspondence, and presents before management, the Transportation Authority Board, and other external agencies.

- Performs related duties as required and assigned.

**Supervisory Responsibilities:** Supervises Transportation Planners. May supervise Senior Transportation Planners, interns and external consultant teams.

**MINIMUM QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills, abilities, training and experience required of this job.

**Training and Experience:** Completion of a graduate degree in an appropriate discipline such as transportation planning or civil engineering; and five (5) years of progressively responsible experience in transportation planning, transportation fund programming or allocation.

**Knowledge:** Basic research methods and database management techniques; proficiency with standard computer spreadsheet, word processing, presentation and internet software; statistical and computational analysis principles and methods; advanced knowledge of transportation planning principles, techniques and methods, transportation funding and finance, and capital project development phases.

**Skills and Abilities:** Ability to collect, analyze and interpret data pertaining to transportation planning and programming of funds, information on transportation issues and related legislation using appropriate methods and statistical techniques; design surveys; develop long-range transportation planning priorities; identify project goals and performance measures; oversee and manage projects and consultants; facilitate meetings; summarize and present data and prepare written reports, recommendations, and outreach materials; speak effectively and write clearly and concisely; exercise tact and courtesy in working with members of the general public; and interact effectively with Transportation Authority Board members, other government officials, professional and technical colleagues and staff.

**Physical Demands and Work Environment:** The physical demands and work environment are characteristic of modern office work and include moderate noise (examples: business office with computers and printers, light traffic), and are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Ability to travel on occasion.

**Employment Status:** *Full-Time, Exempt.* An employee in this position is not subject to the minimum wage and overtime requirements of the Fair Labor Standards Act and is regularly scheduled to work 40 hours a week.

**Annual Compensation Range: \$110,748-\$149,508.....Adopted xxx xx, 20xx  
Resolution xx-xx**





# Job Description

## TRANSPORTATION PLANNER SERIES PLANNING DIVISION

### ASSISTANT DEPUTY DIRECTOR FOR PLANNING

**Reports to:** Deputy Director for Planning

**Exemption Status:** Full-Time, Exempt

#### SUMMARY

The Transportation Planner Series-Planning Division includes four levels of professional Transportation Planners who manage planning and corridor studies and other planning projects, facilitate community outreach efforts, and represent the Transportation Authority on technical and policy advisory groups.

The Assistant Deputy Director for Planning is responsible for the management of a functional unit within the Planning Division, and advises and assists the Deputy Director for Planning in the formulation and development of policies regarding planning and corridor studies. The Assistant Deputy Director for Planning works on assignments that are highly complex and sensitive in nature, where substantial judgment and initiative is essential in making recommendations and resolving problems. The duties specified below are characteristic of the range of duties and responsibilities assigned to this position, and not intended to be an inclusive listing.

#### ESSENTIAL DUTIES AND RESPONSIBILITIES

- Designs and conducts complex technical planning studies. Collects, analyzes and interprets transportation data, designs surveys, develops long-range transportation planning priorities, summarizes data and prepares reports, and reviews transportation model inputs and outputs.
- Performs project management for large planning and corridor studies. Duties include developing proposals; recommending consultant selection; developing and tracking project budget, scope and performance measures; grant application and management; managing consultant and Transportation Authority staff team; reviewing and reporting on study progress and deliverables; corresponding with agency partners; and develop and implement public outreach plans.
- Represents the Transportation Authority in federal, regional, state and local transportation task forces, professional associations and technical and policy advisory groups. Reviews and comments on relevant transportation plans and studies produced by other agencies.
- Supervises, develops, and evaluates professional and subordinate staff and counsels and disciplines staff.
- Reviews production of grants, contracts, memorandums, and correspondence prepared by the unit.
- Develops and manages annual work plan for unit and establishes work activity priorities and staff assignments.
- Maintains contacts with peers from federal, state, and regional agencies, including Transportation Authority sponsor agencies and staffs of elected local, regional, state and federal officials.
- Prepares Board memoranda and official Transportation Authority correspondence, and presents before management, the Transportation Authority Board, and other external agencies.

- Provides general planning assistance to Deputy Director for Planning and other Divisions, including reviewing and commenting on studies, and providing input into the Countywide Transportation Plan, the Congestion Management Program, 5-Year Prioritization Program and Strategic Plan.
- Performs related duties as required and assigned.

**Supervisory Responsibilities:** Supervises Transportation Planners. May supervise Senior Transportation Planners, interns, and external consultant teams.

**MINIMUM QUALIFICATIONS**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills, abilities, training and experience required of this job.

**Training and Experience:** Completion of a graduate degree in an appropriate discipline such as transportation planning or civil engineering; and six (6) years of progressively responsible experience in transportation planning, programming or funding, including at least three (3) years of demonstrated staff management experience.

**Knowledge:** Basic research methods and database management techniques; proficiency with standard computer spreadsheet, word processing, presentation and internet software; and statistical and computational analysis principles and methods; and advanced knowledge of transportation planning principles, techniques and methods; transportation funding and finance; and capital project development phases.

**Skills and Abilities:** Ability to collect, analyze and interpret data pertaining to transportation planning and programming of funds, information on transportation issues and related legislation using appropriate methods and statistical techniques; design surveys; develop long-range transportation planning priorities; identify project goals and performance measures; oversee and manage projects and consultants; facilitate meetings; summarize and present data and prepare written reports and recommendations, and outreach materials; speak effectively and write clearly and concisely; exercise tact and courtesy in working with members of the general public; and interact effectively with Transportation Authority Board members, other government officials, professional and technical colleagues and staff.

Ability to perform the above independently; determine most appropriate and effective method of communicating with general public, Board members, other government officials and professional and technical colleagues and staff.

**Physical Demands and Work Environment:** The physical demands and work environment are characteristic of modern office work and include moderate noise (examples: business office with computers and printers, light traffic), and are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Ability to travel on occasion.

**Employment Status:** *Full-Time, Exempt.* An employee in this position is not subject to the minimum wage and overtime requirements of the Fair Labor Standards Act and is regularly scheduled to work 40 hours a week.

**Annual Compensation Range: \$110,748-\$149,508.....Adopted xxx xx, 20xx  
Resolution xx-xx**



# Job Description

## TRANSPORTATION PLANNER SERIES TECHNOLOGY, DATA AND ANALYSIS DIVISION

### SENIOR TRANSPORTATION PLANNER – MODELING/GIS

**Reports to:** Deputy Director for Technology, Data and Analysis

**Exemption Status:** Full-Time, Exempt

#### SUMMARY

The Transportation Planner Series-Technology, Data and Analysis Division includes three levels of professional Transportation Planners who prepare complex travel demand forecasting model applications for planning studies; maintain the model; and manage the Geographic Information Systems (GIS) database.

The Senior Transportation Planner-Modeling/GIS is the second level of the Transportation Planner Series-Technology, Data and Analysis Division. Under general supervision, the Senior Transportation Planner-Modeling/GIS assists with the duties and responsibilities listed below, which are characteristic of the range of duties and responsibilities assigned to this position, and are not intended to be an inclusive listing.

#### ESSENTIAL DUTIES AND RESPONSIBILITIES

- Maintains Transportation Authority's travel demand forecasting model and Geographic Information Systems (GIS) activities. Tracks network inputs and land use data. Manages databases, including expanding and updating the Transportation Authority's data, coordinating with other agencies to facilitate data exchange, and helping to design and implement model and GIS improvements.
- Provides general modeling and GIS assistance to other Transportation Authority Divisions, external agencies and the public. Provides GIS and mapping services, and model results for various planning studies and Strategic Analysis Reports.
- Provides general modeling and GIS input into the development of the Transportation Authority's various programs and plans, including, but not limited to, the Countywide Transportation Plan and the Congestion Management Program Capital Improvement Plan.
- Develops and tracks project budgets, scope and performance measures for smaller planning studies; selects and manages consultants and contracts; facilitates technical and project meetings; reviews and reports on progress and deliverables; and corresponds with partnering agencies. Provides oversight of all project management activities assigned to staff.
- Prepares Board memoranda and official Transportation Authority correspondence, and presents before management, the Transportation Authority Board, and other external agencies.
- Maintains contacts with peers from federal, state, and regional agencies, including Transportation Authority sponsor agencies and staffs of elected local, regional, state and federal officials.
- Performs related duties as required and assigned.

**Supervisory Responsibilities:** May supervise interns and external consultant teams.

#### MINIMUM QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills, abilities, training and experience required of this job.

**Training and Experience:** Completion of a graduate degree in an appropriate discipline such as transportation planning, civil engineering, information systems, computer science, business or public administration, or related field, and three (3) years of experience in transportation planning, travel demand forecasting or GIS analyses for transportation planning purposes. An equivalent combination of education and experience is acceptable.

**Knowledge:** Knowledge of standard transportation planning principles, techniques and methods; travel demand models and their applications in planning studies; quantitative and computational analysis principles and methods; computer programming in scripting, preferably C++ and Java languages; Citilabs TP+ travel forecasting software package capabilities. Advanced proficiency with standard computer spreadsheet, word processing, database management and other office administration software.

**Skills and Abilities:** Ability to collect, analyze and interpret data pertaining to planning issues using appropriate methods and statistical techniques; summarize and present technical data and prepare written reports and recommendations; speak effectively and write clearly and concisely. Ability to exercise tact and courtesy in working with members of the public, professional and technical colleagues, and elected officials.

**Physical Demands and Work Environment:** The physical demands and work environment are characteristic of modern office work and include moderate noise (examples: business office with computers and printers, light traffic), and are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Ability to travel on occasion.

**Employment Status:** *Full-Time, Exempt.* An employee in this position is not subject to the minimum wage and overtime requirements of the Fair Labor Standards Act and is regularly scheduled to work 40 hours a week.

**Annual Compensation Range: \$80,340-\$108,456..... Adopted XX XX, 20XX  
Resolution XX-XX**