



Memorandum

Date: 10.30.15 **RE:** Personnel Committee
November 4, 2015

To: Personnel Committee: Commissioners Wiener (Chair), Tang (Vice Chair), and Avalos

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

Through: Tilly Chang – Executive Director *TC*

Subject: **ACTION** – Recommend Adoption of a New Program Analyst Job Classification and Reclassifying Two Positions

Summary

In May 2014, the Board approved a staff reorganization plan to address staff capacity issues with new goals and responsibilities, existing workload management needs and issues, and retention and succession planning. That plan added eight full-time equivalent (FTE) positions, and since then the Transportation Authority has hired seven of the eight new positions, with the current vacant position being a Senior Engineer in the Capital Projects Division. There is also an existing vacant Senior Engineer position (due to a retirement) in the Policy and Programming Division. As we have been implementing the new organizational structure over the past year, we have continued to pay close attention to workload management needs, striving to address them through a combination of the staff reorganization plan, as well as changes to our business processes and practices such as with the recent implementation of the new enterprise resource planning software, which simplified a number of tasks. Based on these considerations, along with opportunities afforded by recent hires, we have concluded that the current vacant positions, Senior Engineers in the Policy and Programming and Capital Projects Divisions, would better align with near-term work program needs if the positions were reclassified to a Program Analyst in the Policy and Programming Division (a new job classification for the agency) (Attachment 1) and a Principal Transportation Planner in the Planning Division, respectively. Attachment 3 shows the proposed changes to the organizational structure, which would retain the current number of full-time equivalent positions (41).

BACKGROUND

In May 2014, through Resolution 14-80, the Board approved a staff reorganization plan to address staff capacity issues with new goals and responsibilities, existing workload management needs and issues, and retention and succession planning. That plan added eight full-time equivalent positions (FTEs), raising the Transportation Authority's total from 33 to 41 FTEs, a 24% 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 2014 staff reorganization plan was adopted, the Transportation Authority has hired seven of the eight new positions: Senior Communications Officer, Management Analyst, Staff Accountant, Administrative Assistant, Senior Planner, and two Transportation Planners. The Senior Engineer in the Capital Projects Division is the eighth position and remains open. There is also an existing vacant Senior Engineer position (due to a retirement) in the Policy and Programming Division.

DISCUSSION

The purpose of this memorandum is to present a proposed new job classification for the agency (a Program Analyst in the Policy and Programming Division) and two staff reclassifications for currently vacant positions, and to seek a recommendation for adoption.

As we have been implementing the new organizational structure over the past year, we have continued to pay close attention to workload management needs, striving to address them through a combination of the staff reorganization plan, as well as changes to our business processes and practices such as with the recent implementation of the new enterprise resource planning software, which simplified a number of tasks. Based on these considerations, along with opportunities afforded by recent hires, we have concluded that the current vacant positions, Senior Engineers in the Policy and Programming and Capital Projects Divisions, would better align with near-term work program needs if the positions were reclassified to a Program Analyst in the Policy and Programming Division (a new job classification for the agency) and a Principal Transportation Planner in the Planning Division.

Attachment 1 shows the proposed description for the new Program Analyst position. Attachment 2 shows the currently approved description for the Principal Transportation Planner in the Planning Division for reference. Attachment 3 shows the proposed changes to the organizational structure, which would retain the current number of full-time equivalent positions (41).

The new Program Analyst job classification was developed with assistance from Koff & Associates, the agency which conducted our most recent compensation survey.

ALTERNATIVES

1. Recommend adoption of a new Program Analyst job classification and reclassifying two positions, as requested.
2. Recommend adoption of a new Program Analyst job classification and reclassifying two positions, with modifications.
3. Defer action, pending additional information or further staff analysis.

CAC POSITION

None. The CAC does not take positions on personnel matters.

FINANCIAL IMPACTS

The reclassification of the Senior Engineer position to Program Analyst in the Policy and Programming Division would save \$49,020 in personnel costs in the current fiscal year. The Senior Engineer and Principal Transportation Planner positions in the Capital Projects Division have the same salary range so there would be no cost impact for the reclassification.

RECOMMENDATION

Recommend adoption of a new Program Analyst job classification and reclassifying two positions.

Attachments (3):

1. Program Analyst job description
2. Principal Transportation Planner for Planning job description
3. Proposed Changes to Organizational Structure



Job Description

POLICY & PROGRAMMING DIVISION PROGRAM ANALYST

Reports to: Deputy Director for Policy & Programming

Exemption Status: Full-Time, Exempt

Summary

The Program Analyst supports the development of, organizes, leads and/or participates in detailed analytical work in the areas of grants administration and program oversight, data management, and fund programming. Under the general supervision of the Deputy Director for Policy & Programming, the Program Analyst 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 a comprehensive listing.

Essential Duties and Responsibilities

- Coordinate timely issuance of grant agreements for Prop K half-cent sales tax and Prop AA vehicle registration fee programs.
- Schedule project kick off meetings with project sponsor, review grant reporting, invoicing, attribution and other requirements; deliverables; and special conditions.
- Process and perform initial review of sponsor reimbursement requests (invoices) and assign invoices to Transportation Authority lead for project oversight.
- Review and approve project progress reports and sponsor invoices checking for compliance with grant terms and conditions; review and recommend approval of sponsor requests for amendments to grant agreements.
- Analyze and update agency policies, procedures, and templates related to grant administration and oversight, including but not limited to annual updates to the standard grant agreement template; identify administrative and programmatic changes; prepare, present and coordinate implementation of new policies, procedures and/or templates.
- Assist with coordination of project sponsor submittals for the Transportation Authority's annual report.
- Perform analyses to support grant program administration, agency capital budget preparation, and communications; work with agency staff to prepare, analyze, and distribute reports including spreadsheets, tables, charts, and other graphics as required.
- Assist with project set up in Microsoft Dynamics AX (financial system), the Portal (web-based grants administration database), and MyStreet SF (interactive map of projects funded by the Transportation Authority) and perform system maintenance and updates as required (e.g. at year-end, at time of project amendment or closeout).

- Work closely with staff from the Finance and Administration, Policy and Programming, and Capital Projects Divisions on invoice tracking, budget, and other financial support using Microsoft Dynamics AX and/or the Portal.
- Perform related duties as required and assigned.

Supervisory Responsibilities

May supervise interns and assist with management of 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: Bachelor's degree in a related field such as transportation planning, public administration, public finance, accounting, or economics from an accredited university; and one year of related experience. A graduate degree in one of the appropriate fields or may substitute for one year of the required experience, or an equivalent combination of education and experience.

Knowledge: Knowledge of principles, practices and techniques of capital program management; principles and techniques of financial/fiscal analysis; principles and techniques of economic and policy analysis; statistical and computational analysis, principles, and methods; database management techniques; advanced proficiency with standard computer spreadsheet, word processing, presentation and internet software; and other office administration software.

Skills and Abilities: Ability to develop and assist with implementation of an effective capital program monitoring plan to ensure compliance with grant requirements and to support transparency, accountability, and timely and cost effective project delivery; ability to collect, synthesize, analyze, and interpret a wide variety of information and data pertaining to transportation projects such as fund programming, expenditures rates, and project delivery progress; conduct complex analytical analyses utilizing various administrative and financial systems; summarize and present data and prepare clear and concise written reports and recommendations; communicate effectively with diverse groups; work independently and efficiently to identify and solve problems, calculate statistics including mathematical averages and percentages; set up and maintain relational database files, perform queries, and retrieve data to prepare reports; adapt to changing technology; organize and prioritize work; coordinate a variety of projects simultaneously; establish and maintain cooperative working relationships.

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.

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



Job Description

TRANSPORTATION PLANNER SERIES PLANNING DIVISION

PRINCIPAL TRANSPORTATION PLANNER

Reports to: Deputy Director for Planning

Exemption Status: Full-Time, Exempt

Summary

The Transportation Planner Series-Planning Division includes three 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 Principal Transportation Planner is the advanced level of the Transportation Planner Series-Planning Division. The Principal Transportation Planner 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 Principal Transportation Planner works on assignments that are highly complex and sensitive in nature, where substantial judgment and initiative 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.
- Supervises, develops, and evaluates professional and subordinate staff and counsels and disciplines staff. Manages Planning Division intern program.
- 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 Senior Transportation Planner and Transportation Planner positions. Supervises interns. May supervise 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, programming or funding, including at least two (2) 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: \$93,168-\$125,772..... Adopted May 21, 2013
Resolution 13-50**

Attachment 3

SAN FRANCISCO COUNTY TRANSPORTATION AUTHORITY

Proposed Agency Structure and Functions

41 Staff Positions

- Existing position
- Reclassified position

