



## HUMAN RESOURCES DEPARTMENT Santa Cruz METRO

Class Code: 1600-OA65

FLSA Status: Exempt

### Planning and Development Director Bargaining Unit: Management

#### **DEFINITION:**

Under the direction of the CEO/General Manager, the Planning and Development Director plans, develops, organizes and directs three distinct Santa Cruz METRO functions: (1) planning and scheduling of route and service development; (2) overseeing grant research, review, preparation, and administration for capital and operations funding; and (3) governmental affairs (working with local, state, and federal representatives and legislative advocates to develop and support legislation beneficial to Santa Cruz METRO and the region). Performs other related duties as assigned.

#### **DISTINGUISHING CHARACTERISTICS:**

The incumbent is expected to exercise independent judgment and initiative in establishing efficient and effective service operations consistent with the needs of Santa Cruz METRO's. The incumbent may serve as the governmental affairs advocate. The incumbent also functions as a member of Santa Cruz METRO's senior leadership team and participates actively in addressing issues of concern to the Department and the organization.

#### **EXAMPLES OF DUTIES AND RESPONSIBILITIES:**

*The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.*

- Manages the grants and legislative process including identification of funding sources, the oversight of all Federal, State, and local grant applications, and the administration of awarded grants.
- Works with Federal, State, and local legislators directly, or through legislative advocates and transit organizations to develop, introduce, and support legislation that improves the financial and operating ability of Santa Cruz METRO.
- Monitors Federal, State, and local developments and legislation that could affect transportation and provides periodic reports to the CEO/General Manager and the Board on the effects of proposed legislation on Santa Cruz METRO.
- Makes policy recommendations to the CEO/General Manager and the Board related to proposed or existing legislation and grant opportunities for short and long term capital and operating funding strategies.
- Works with staff to review statistical information regarding ridership, traffic congestion, and other available data used in the formation of productivity/efficiency measurements of bus routes.
- Supervises and provides direction to staff on the development and implementation of the fixed route bids. Participates in meetings with the union(s) regarding service compliance with the Collective Bargaining Agreement/Memorandum of Understanding and the service change and bidding process.



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- Responsible for scheduling any mandated outreach programs associated with grants, and route planning including, but not limited to, Title VI analysis and major services changes requiring a public hearing.
- Plans, directs, coordinates, and reviews the work of department staff. Reviews and evaluates work products and develops/updates procedures and/or policies for the department and Santa Cruz METRO in areas assigned.
- Develops, administers, and manages the department's annual budget. Is responsible for forecasting the funds required for staffing, equipment, training, etc. and then monitors and approves spending to ensure compliance within the authorized budget limits.
- Participates in the selection, training, supervision and evaluations of staff. Establishes professional standards for work quality, quantity, performance, and accountability within the department. Fosters a continuous improvement environment and sets goals for team members.
- Prepares written reports and presentations for staff and the Board of Directors; represents Santa Cruz METRO at various meetings; and communicates with government officials and personnel from other transit agencies.
- Develops Key Performance Indicators (KPI's), scorecards, dashboards, and other analysis tools that will assist the CEO/General Manager in his/her goals of measuring productivity, efficiencies and to set stretch goals.
- Performs other duties as assigned.
- Perform as a hand on "working" Manager.

### **EMPLOYMENT STANDARDS:**

#### **Knowledge of:**

- Policies, procedures, and regulatory requirements governing funding programs from Federal, State, and local sources.
- Controls required by State, Federal, and local funding agencies, including those that will be audited by Santa Cruz METRO's annual outside auditor, Caltrans, and in a Triennial or other FTA audit.
- Grant requirements, including grant writing and application, administration, document control, and budgeting.
- Principles and practices of public funding.
- Budget management methods for operating, short and long term capital funding.
- Principles and practices of supervision and leadership.
- Current software programs for work processing, spreadsheets, and presentations at the intermediate level.
- Principles of transit operations and route development.
- The Development of key performance indicators, scorecards and dashboards.
- Project management, project controls and project management software
- CEQU and NEPA

#### **Ability to:**

- Direct the planning and administration of a grants program.



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- Aggressively pursue potential and innovative funding options from Federal, State, and local sources.
- Investigate, analyze, evaluate, and make recommendations on complex legislative issues.
- Effectively motivate, train, and evaluate the performance of staff.
- Work as part of a team to develop consensus and problem solve.
- Develop conclusions and implement policy to further the agency's mission statement by evaluating data and interacting with staff.
- Communicate effectively both orally and in writing with individuals both within and outside the department.
- Establish and maintain effective working relationships with employees, union representatives, Board members, stakeholders, elected and appointed officials, media representatives, and members of the public.

### **MINIMUM QUALIFICATIONS:**

#### **Education, Training and Experience:**

Bachelor's degree from an accredited college in business, political science, public administration, geography, transportation planning, engineering, or a closely related field.

#### **AND**

Eight (8) years professional experience in business management, public administration, transportation planning, grants administration, route and service planning and development, and government affairs experience, including two (2) years supervisory experience, preferably in a public agency. Familiarity with transit agency or transportation system activities and functions is highly desirable. Experience in a large public organization is preferred.

#### **Additional training and experience desirable, but not required:**

- FTA National Transit Institute coursework.
- Certified Planner through the American Institute of Certified Planners (AICP), with Certified Transportation Planner (CTP) specialty.
- Intermediate level experience using project management software.
- Experience with construction project management and contract management.
- Experience with transit oriented development.
- Experience with full funding grant agreements and other State and Federal funding tools.
- Experience with public-private partnerships.
- Extensive knowledge of run-cutting software (HASTUS and/or Trapeze).
- Experience with air quality and sustainability concepts and laws (AB375, AB32, etc.)
- Experience with CEQA and NEPA

### **LICENSES AND CERTIFICATES:**

A valid Class C driver license and safe driving record is required at the time of application. A valid Class C State driver license is required at the time of appointment and must be maintained throughout employment.



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### SPECIAL REQUIREMENTS:

- Must be able to travel to attend meetings occurring outside the local area, including meetings that may take place at night.
- Must be willing to travel to Washington D.C., Sacramento, and other key areas where direct legislative contact may be required.
- Must be able to work extended hours as needed, often outside regular business hours as required by the CEO and the demands of the job.
- Must maintain strictest confidentiality.
- Must participate in professional development activities.

### PHYSICAL AND MENTAL DEMANDS:

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

#### Physical Demands

While performing the duties of this job, the employee is regularly required to sit, walk and stand; talk and hear; use hands to finger, manipulate, handle, feel or operate objects, tools or controls; reach with hands and arms; and perform repetitive movements of hands or wrists. The employee is regularly required to bend and twist at the neck, reach with hands and arms. Occasional standing, walking, overhead reaching and lifting up to 20 pounds unaided is required. Specific visual abilities required for this job include close vision, distance vision, and the ability to adjust focus.

#### Mental Demands

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

#### Work Environment:

The employee works in an office environment where the noise level is usually quiet. May require availability to work a flexible schedule.

### OTHER CONDITIONS OF EMPLOYMENT:

Must pass requisite background check.

\*Adopted: November 2017

\*BOD Approved: 01-26-18

\*Revised: 00-00-00

\*Job Family: Professional – Grants/Planning