

STAFF REPORT

SUBJECT: Manager of Customer Service & Contract Oversight and Director of Planning & Marketing Positions

FROM: Michael Tree, Executive Director

DATE: June 4, 2018

Action Requested

The Finance & Administration Committee recommends that the Board approve the new position of Manager of Customer Service & Contract Oversight and the position of Director of Planning & Marketing

Background

The current organizational chart includes a Director of Planning & Operations, which oversees the planning department and the oversight of contracts that provide the operations of the agency's services. Due to the volume of projects at the agency the Director of Planning & Operations has not historically been able to provide oversight of operations contracts as outlined in the agency's Contractor and Subrecipient Oversight Procedures.

Additionally, the Director of Finance has historically overseen Customer Service, which has seen an increase in activity with the bus system redesign and accompanying increase in choice riders. Additionally, with the increase in projects at the agency has come additional tasks in the finance department. The end result is the finance department is not able to expend the time necessary for day-to-day activities in procurement oversight and audit preparation, which are critical tasks.

Discussion

Staff proposes to create a new position at the agency titled Manager of Customer Service & Contract Oversight that will both oversee the customer service department, and provide the time and resources necessary to appropriately oversee the agency's contracts to ensure the agency that the contractors are providing the services with excellence that are outlined in the contracts. This would eliminate the Customer Service responsibilities in the Director of Finance, and the contract oversight responsibilities for the agency's operations in the Director of Planning & Operations position.

After recent interviews for the Director of Planning & Operations, staff notes that the most qualified applicant also has substantial experience in transit marketing and, after considerable discussion with the applicant, staff recommends that the job position of Director of Planning & Operations and the job position of Marketing Manager be merged and retitled Director of Planning and Marketing.

Fiscal Impact

The salary range for the Manager of Customer Service & Contract Oversight is \$7,447 to \$10,426.

The salary range for the Director of Planning & Marketing is \$8,937 to \$12,510.

The financial impact to the agency of the proposed changes is a savings of \$15,000.

Recommendation

The Finance & Administration Committee recommends that the Board approve the new position of Manager of Customer Service and Contract Oversight and the position of Director of Planning and Marketing

Attachments:

1. Job Description - Manager of Customer Service and Contract Oversight
2. Job Description – Director of Planning and Marketing
3. Modified Job Description – Director of Finance
4. Current Organizational Chart
5. Proposed Organizational Chart

Submitted: _____

Behavior

The employee shall work well under pressure meeting multiple and sometimes competing deadlines. The employee shall at all times demonstrate cooperative behavior with colleagues, supervisors, contract service provider, and the public.

KNOWLEDGE/SKILLS REQUIRED BY POSITION

Skills & Abilities:

Ability to think strategically and proactively;
Ability to lead and coordinate projects;
Ability to make effective public presentations;
Ability to communicate effectively, both orally and in writing;
Ability to obtain public acceptance of the Authority;
Ability to motivate staff;
Ability to recognize business problems, develop alternatives, and implement viable solutions;
Ability to prepare and monitor departmental operating budget.

Knowledge of:

Knowledge of Project Management principles and demonstrated experience in project delivery, meeting scope, schedule, budget, and quality requirements;
Transit planning principles;
Information technology resources;
Relative location of cities, basic geography and prominent landmarks of the Wheels service area.

ORGANIZATIONAL RELATIONSHIPS

Position reports directly to:

Executive Director

Position supervises:

Paratransit Planner Specialist
Senior Fleet and Technology Management Specialist
Customer Service Supervisor and two representatives

Position coordinates with:

All Authority staff, particularly department directors
Maintenance and Operations Contractor staff
Vendors and the public

QUALIFICATIONS

Bachelor's degree in Transportation Planning, Business Administration, Communication, Planning, or related field. The position requires 3-5 years of experience in passenger transportation. Project and/or Contract Management experience desirable.

LIVERMORE/AMADOR VALLEY TRANSIT AUTHORITY

POSITION DESCRIPTION

POSITION Director of Planning and Marketing

CLASSIFICATION Exempt

POSITION DESCRIPTION

The Director of Planning and Marketing reports to the Executive Director and under his/her direction oversees and manages short and long range operations planning, marketing, and community outreach functions.

SPECIFIC DUTIES AND RESPONSIBILITIES

55% *Short and Long Range Operations Planning Management*

- Oversee the strategic development of short and long-range transit plans and other related planning efforts;
- Monitor performance of operations and manage development of service change recommendations as appropriate to provide quality transportation services;
- Work with departments from each member city and Alameda County to ensure Authority transit services meet the current and future needs of each city and the County;
- Respond to community input on service design;
- Represent the Authority on various planning committees and organizations.

30% *Marketing Management*

- Oversee the strategic planning, creation and implementation of the Authority's marketing and community outreach efforts;
- Direct the agency's contract for creative and design services;
- Manage the agency's on-vehicle advertising contract;
- Serve as the agency's Public Information Officer.

10% *Provide a Leadership Role within the Agency*

- Support the Executive Director;
- Assist in supporting the Authority's Board of Directors;
- Work collaboratively with other members of the agency's Management Team;
- Effectively manage the Planning and Marketing Department staff.

5% *Other duties as assigned*

Behavior

The employee shall work well under pressure meeting multiple and sometimes competing deadlines. The employee shall at all times demonstrate cooperative behavior with colleagues, supervisors, contract service provider, and the public.

KNOWLEDGE/SKILLS REQUIRED BY POSITION

Skills & Abilities:

Ability to think strategically and proactively;
Ability to lead and coordinate projects;
Ability to develop and prepare comprehensive service plans, studies, and reports;
Ability to make effective public presentations;
Ability to communicate effectively, both orally and in writing;
Ability to obtain public acceptance of the Authority;
Ability to motivate staff;
Ability to recognize business problems, develop alternatives, and implement viable solutions;
Ability to prepare and monitor departmental operating budget.

Knowledge of:

Knowledge of Project Management principles and demonstrated experience in project delivery, meeting scope, schedule, budget, and quality requirements;
Transit planning principles, survey design, implementation and analysis;
Marketing and communications principles;
Knowledge and understanding of design principles, marketing strategies, public relations, advertising, research and planning techniques and philosophy;
Knowledge of general principles, methods, practices of public outreach;
Knowledge of state, federal and regional laws and regulations relating to funding and operations of public transit;
Ability to research and quickly synthesize information
Relative location of cities, basic geography and prominent landmarks of the Wheels service area.

ORGANIZATIONAL RELATIONSHIPS

Position reports directly to:

Executive Director

Position supervises:

Senior Transit Planner
Marketing & Communications Specialist
Planning Interns
Marketing Interns

Position coordinates with:

All Authority staff, particularly other department directors
Maintenance and Operations Contractor staff

Representatives of federal, state, regional, county and city agencies

Local civic groups and businesses

Vendors

The public

QUALIFICATIONS

Bachelor's/Master's degree(s) in Transportation Planning, Business Administration, Urban Planning, or related field. Five years of responsible management experience in public transit preferably at the local or regional level. The position requires 3-5 years of planning experience as well as 3-5 years of experience reporting directly to a governing body (i.e., Board of Directors) or substantial interaction with a governing body.

LIVERMORE AMADOR VALLEY TRANSIT AUTHORITY

POSITION DESCRIPTION

POSITION Director of Finance

CLASSIFICATION Exempt

POSITION DESCRIPTION

The Director of Finance reports directly to the Executive Director and under his/her direction plans, organizes, manages and provides oversight for all accounting and finance of the Authority, including strategic financial planning, preparing of financial reporting, and facilitating audits. Additionally, provides general administrative support, human resources management and customer service oversight.

SPECIFIC DUTIES AND RESPONSIBILITIES

55% *Accounting/Finance*

- Provide oversight and manage all financial activities of the Authority;
- Oversee fare collection including daily reports, farebox security, and revenue reconciliation;
- Maintain general ledger and prepare monthly Financial Reports;
- Oversee the preparation of the annual state and federal reports such as the State Controller's Report and the National Transit Database;
- Prepare appropriate information for the annual financial audit;
- Assure financial management systems conform to generally accepted accounting principles and standards, and to the requirements of the state and federal governments;
- Monitor Authority's financial condition and advise the Executive Director of financial management issues;
- Facilitate the strategic planning process and prepare Authority's annual operating and capital budget;
- Review established policies, systems and procedures governing all aspects of the Authority's accounting, bookkeeping, and financial reporting activities;
- Administer and process claims for federal, state and local agency grants;
- Assist staff in conducting financial analysis of fixed route transit, paratransit service alternatives, financial forecasting, SRTP preparation, and other projects.

15% *Grants Management*

- Identify and develop new sources of agency funding;
- Comply with all federal, state, and regional project development requirements (TIP, CMP, STIP, etc.);

- Oversee preparation of formula grant applications to federal, state, and regional agencies for capital and operating subsidies;
- Oversee preparation of periodic reports required by funding agencies;
- Oversee request for payments from funding agencies in accord with each agencies' requirements;
- At times, represent the Authority at meetings of various funding agencies;
- Monitor all federal, state, and regional laws and Notices of Proposed Rulemaking (NPRM's) relating to public transit;
- Ensure agency complies with all state and federal regulatory programs, specifically DBE, EEO, Title VI, CARB and ADA.

15% Capital Projects, Asset Management, and Contract Management

- Prepare budget for capital improvements and monitor expenditures;
- Oversee fixed assets management and control;
- Administer purchasing and inventory programs and policies;
- Oversee Operations and Maintenance contract with respect to billing. Specifically, develop programs and methods to monitor contractor operations to ensure that they conform to contract requirements for billing;
- Assist in preparation of contract documents;

10% General Administrative Support and Human Resource Management

- Provide centralized administrative support services, including purchasing and records management for all Authority departments;
- Administer procurement and inventory programs and policies and act as Authority's Procurement Officer;
- Create and oversee Authority's Human Resources policies, procedures and processes;
- Develop and oversee training programs;
- Oversee the recruitment process;
- Counsel employees and managers on human resources matters;
- Oversee the Authority's employee pay, benefit plan, insurance programs;
- Maintain personnel records, including health benefits, retirement benefits, etc., and acts as liaison with Public Employees Retirement System;

5% Other duties as assigned

Behavior

The employee shall work well under pressure meeting multiple and sometimes competing deadlines. The employee shall at all times demonstrate cooperative behavior with colleagues, supervisors, contract service provider, and the public.

ORGANIZATIONAL RELATIONSHIPS

Position reports directly to:

Executive Director

Position supervises:

Accounting Analyst

Administrative Assistant

Customer Service Supervisor

Customer Service Representative (2)

Position coordinates with:

All Authority staff

Contractor staff

Representatives of federal, state, regional, county and city agencies

Local civic groups and businesses

Vendors

The public

QUALIFICATIONS

Credentials:

Bachelor's degree in public finance, accounting, economics, business administration, public administration, or related field pertinent to position. Master's Degree in Business Administration or related field is desired.

Professional Experience:

Five to seven years' experience in performing accounting, grants management and financial management functions, preferably with a public transit or public agency. Knowledge of human resource management and experience with supervision, or any combination of training and experience that provides the required skills, knowledge and abilities.

KNOWLEDGE/SKILLS REQUIRED BY POSITION

Skills & Abilities:

Ability to lead and coordinate projects;

Ability to make effective public presentations;

Ability to communicate effectively, both orally and in writing;

Ability to motivate staff;

Ability to recognize business problems, develop alternatives, and implement viable solutions;

Strategic and tactical thinking skills.

Ability to handle multiple and changing priorities and deadlines.

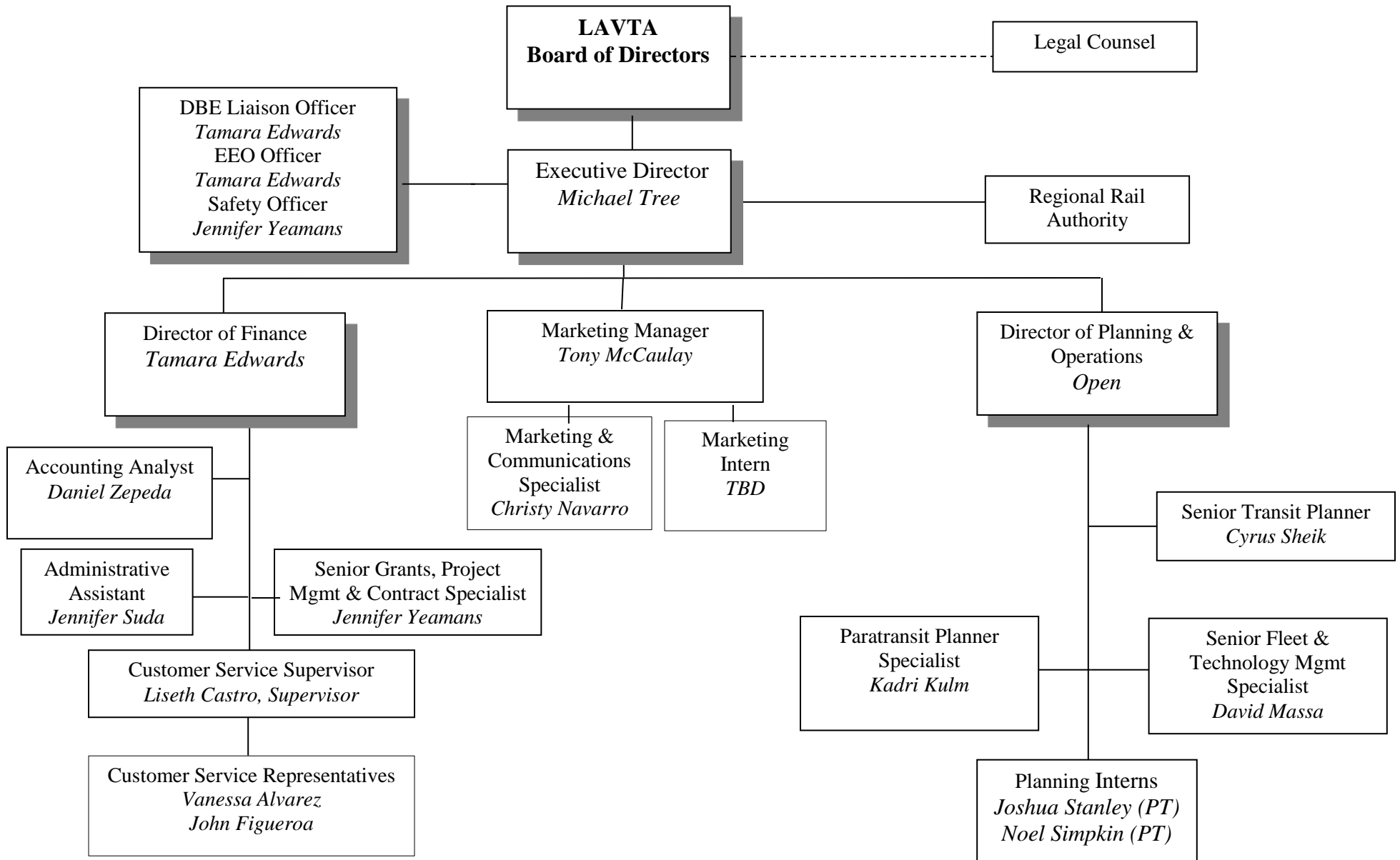
Ability to work effectively with representatives of federal, state and local government agencies, local elected and appointed officials and with the general public.

Knowledge of:

Accounts Payable
Accounts Receivable
Payroll
General Accounting
Public Procurement Policies
Federal and State Reporting
Grant application and proposal preparation, and grant funds disbursement.
Federal and private funding sources.
Principles, operations and methods of public finance, fiscal management, transportation planning, and public administration, including accounting, budget preparation, program analysis, and revenue forecasting.
Federal and State laws, regulations, and requirements pertaining to transportation grants programs and audits.
Principles and techniques of management analysis, organizational and human resource management and employee benefit administration.

LIVERMORE AMADOR VALLEY TRANSIT AUTHORITY

Organizational Chart



LIVERMORE AMADOR VALLEY TRANSIT AUTHORITY

Organizational Chart

