



EXECUTIVE MANAGER, PLANNING AND BUDGET

FC: XF213
PB: 14
FLSA: Exempt

PC: 980
BU: 95 (NR)
Created: July, 2001
Revised: December 28, 2005

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

DEFINITION

Plans, directs, manages and oversees the activities and operations of the Office of Planning and Budget including Planning, Capital Development, Operating Budgets, Customer Access management, and Property_Development; coordinates assigned activities with other executive staff, departments and outside agencies; provides highly responsible and complex management and policy support to the General Manager and performs related duties as assigned.

CLASS CHARACTERISTICS

This single position class manages, through subordinate department managers, division managers and supervisors, all activities throughout the District related to the broad areas of planning, operating and capital budgets, financial analysis, customer access, and property development. The incumbent is accountable for accomplishing departmental goals and objectives, and for furthering District goals and objectives within general policy guidelines.

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

1. Assumes full management responsibility for all executive office services and activities including planning, capital development, operating budgets, customer access, and property development.
2. Oversees the development and implementation of executive office and assigned departmental goals, objectives, policies and priorities for each assigned service area.
3. Establishes, within District policy, appropriate service and staffing levels; monitors and evaluates the efficiency and effectiveness of service delivery methods and procedures; allocates resources accordingly.

4. Oversees, through departmental management staff, the delivery of services for the Office of Planning and Budget; works with key staff to identify and resolve problems.
5. Assesses and monitors work load, administrative and support systems, and internal reporting relationships; identifies opportunities for improvement; directs and implements changes.
6. Communicates with Office of Planning and Budget internal customers to identify needs and resource problems; coordinates and allocates staff resources to meet these needs.
7. Participates in District-wide decision making through Executive Manager's meetings and other District groups and teams.
8. Provides strategic direction in policy, service planning, long and short-range financial planning and budgeting, financial analysis, customer access and monitoring program performance, and property development.
9. Monitors developments and legislation related to assigned areas of responsibility; evaluates impact upon District operations; recommends and implements policy and procedural improvements.
10. Selects, trains, motivates and evaluates assigned personnel; provides or coordinates management staff training; works with employees to correct deficiencies; implements discipline and termination procedures.
11. Oversees and participates in the development and administration of the budget for assigned departments; approves the forecast of funds needed for staffing, equipment, materials and supplies; approves expenditures and implements budgetary adjustments as appropriate and necessary.
12. Explains, justifies and defends assigned departmental programs, policies and activities; negotiates and resolves sensitive and controversial issues.
13. Represents the Office of Planning and Budget to other executive staff, departments, elected officials and outside agencies; coordinates assigned activities with those of other departments and outside agencies and organizations.
14. Provides staff assistance to the General Manager; participates on a variety of boards, commissions and committees; prepares and presents staff reports and other necessary correspondence.

15. Attends and participates in professional group meetings; stays abreast of new trends and innovations in the field of planning and financial management.
16. Responds to and resolves difficult and sensitive citizen inquiries and complaints.

QUALIFICATIONS

Knowledge of:

Operations, services and activities of a comprehensive planning, budget, and financial analysis program.

Advanced principles and practices of long and short range financial planning and budgeting.

Advanced principles and practices of property development and management.

Advanced principles and practices of planning program development, implementation and administration.

General government and public agency practices, policies, procedures and regulations.

Federal, State and local funding sources.

Principles and practices of budget preparation and administration.

Principles of supervision, training and performance evaluation.

Related Federal, State and local laws, codes and regulations.

Skill in:

Managing and directing a comprehensive planning and budget program.

Developing and administering executive office and assigned departmental goals, objectives and procedures.

Analyzing and assessing programs, policies and operational needs and making appropriate adjustments.

Identifying and responding to sensitive community and organizational issues, concerns and needs.

Planning, organizing, directing and coordinating the work of lower level staff.

Delegating authority and responsibility.

Selecting, supervising, training and evaluating staff.

Analyzing problems, identifying alternative solutions, projecting consequences of Proposed actions and implementing recommendations in support of goals.

Researching, analyzing and evaluating new service delivery methods and techniques.

Performing long- and short-range financial planning and budgeting.

Preparing clear and concise administrative and financial reports.

Preparing and administering large and complex budgets.

Interpreting and applying applicable Federal, State and local policies, laws and regulations.

Communicating clearly and concisely, both orally and in writing.

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

MINIMUM QUALIFICATIONS

Education:

A Bachelor's degree in economics, public administration, business administration or a closely related field from an accredited college or university.

Experience:

Seven (7) years of (full-time equivalent) verifiable professional planning, financial planning and budgeting experience which must have included at least four (4) years of management experience. Experience in a mass transit, transportation setting or city government preferred.

Substitution:

Additional professional experience as outlined above may be substituted for the education on a year-for-year basis. A Bachelor's degree is preferred.

WORKING CONDITIONS

Environmental Conditions:

Office environment; exposure to computer screens.

Physical Conditions:

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

EEOC Code: 01