



## DIRECTOR OF FUNDING STRATEGY

JC: 000337

PB: 12

FLSA: Exempt

BU: 95 (NR)

Created: June 2021

*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**

Under direction, plans, directs, manages and oversees the activities and operations of the Funding Strategy Department within the Performance and Budget Executive Office; oversees long-range financial planning for BART's extensive capital investment program; leads development of capital program funding strategies; coordinates grant development activities; collaborates with other departments to assess capital program needs, align with funding strategy and guide capital investment decision-making; leads funding partner strategy and coordination with outside agencies; provides highly responsible and complex support to the Assistant General Manager, Performance and Budget, and the General Manager; and performs related duties as assigned.

### **CLASS CHARACTERISTICS**

This single position director-level classification manages, through subordinate employees and managers, activities related to the development and management of the District's Funding Strategy Department. These activities include funding strategy development and advocacy for grant funding and administration of the District's capital financial planning functions, including development of the Capital Improvement Program, capital program prioritization and development and management of funding plans for major capital projects. The incumbent is accountable for accomplishing department goals and objectives.

### **REPORTS TO**

Assistant General Manager, Performance and Budget

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

1. Assumes full management responsibility for all Funding Strategy Department activities, including District capital financial planning and grant development functions.
2. Assumes management responsibility for elements of the capital investment program, including a focus on development of funding strategy and assessment of funding risk capital program-wide and at the project level.
3. Manages capital project funding aspects of interagency agreements between BART and other agencies, including negotiations, forecasting, analysis, relationship management and resolution of disputes.
4. Supports funding planning and analysis for capital investment program including overseeing the

development of the Capital Improvement Program, producing funding scenarios, supporting bond expenditure plans and briefing senior management on capital funding strategy, issues and risk.

5. Develops and maintains relationships with associated funding partners and policy boards.
6. Provides a leadership role to District staff responsible for BART's long-term financial plans to address capital and asset management needs, while maintaining financial stability.
7. Monitors legislation related to areas of responsibility and evaluates impact of potential legislation on the District's capital investment program.
8. Recommends, collaborates with other departments and implements BART policy and process improvements.
9. Develops and administers the department budget, forecasts and advocates for staff and non-labor funding, as necessary.
10. Plans, directs, and coordinates the department's work plan; selects, trains, motivates and evaluates assigned personnel; coordinates staff training and growth opportunities; works with employees to correct deficiencies, discipline, and terminate, as necessary.
11. Serves as the liaison to other departments, elected officials and outside agencies; negotiates and resolves sensitive and controversial issues; attends and participates in professional group meetings; and stays abreast of trends and innovations.

## **QUALIFICATIONS**

### **Knowledge of:**

- Operations and activities of a comprehensive financial planning, analysis, and forecasting program.
- Principles and practices of policy development and administration.
- Advanced methods and techniques of statistical and financial analysis.
- Principles and practices of budget preparation and administration.
- Principles and practices of risk analysis and assessment.
- Grant development landscape related to transit and areas related to transit.
- Principles of supervision, training and performance evaluation.
- Related Federal, State and local laws, codes and regulations.
- Related Federal and State legislation regarding transportation planning.

### **Skill in:**

- Overseeing and participating in the management of comprehensive financial analysis.
- Managing a comprehensive capital investment program.
- Planning, organizing, directing and coordinating the work of lower-level staff.
- Delegating authority and responsibility.
- Selecting, supervising, training and evaluating staff.
- Negotiating with Federal, State, and local funding authorities, as well as other partners.
- Negotiating favorable financial terms in funding and other agreements with partner

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organizations.

- Identifying capital funding sources for capital needs.
- Leading capital funding strategy development.
- Developing processes and criteria for selecting capital projects for funding opportunities.
- Analyzing and identifying operational and workflow problems and recommendations.
- Identifying and responding to sensitive community and organizational issues, concerns and needs.
- Preparing clear and concise administrative and financial reports.
- Communicating complex financial information and analysis verbally and in writing.

### **MINIMUM QUALIFICATIONS:**

#### **Education**

Possession of a Bachelor's degree from an accredited college or university in Accounting, Business Administration, Public Administration or a closely related field.

#### **Experience**

The equivalent of seven (7) years of full-time progressively responsible experience in contract management, fund development, grants administration and/or related public sector fiscal operations. At least three (3) years of the required experience must have included management level responsibilities.

#### **Substitution**

Additional experience as outlined above may be substituted for the education on a year-for-year basis.

### **WORKING CONDITIONS**

#### **Environmental Conditions**

Office environment; exposure to computer screens.

#### **Physical Conditions**

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

**BART EEO-1 Job Group:** 0500 – Executives/Managers  
**Census Code:** 0120 – Financial Managers  
**Safety Sensitive:** No