

# STATE OF MONTANA

## JOB DESCRIPTION

*Montana state government is an equal opportunity employer. The State shall, upon request, provide reasonable accommodations to otherwise qualified individuals with disabilities.*

**Job Title: Fiscal Planner    Position Number: 33215, 05011, 26058**

**Location: Helena**

**Department: Transportation**

**Division and Bureau: Rail, Transit and Planning**

**Section and Unit: Financial Section**

### **Job Overview:**

The Fiscal Planner performs professional-level tasks supporting MDT's grant planning functions in the Transit, Safety & Planning Bureau. These include preparing and assisting in the preparation of various transportation plans, programs, policies, grant needs and ensuring compliance with federal and state laws for development and implementation of such plans, programs, and projects; researching, analyzing, and managing financial data to support transportation planning functions including research, analysis, and interpretation of federal and state laws and guidelines, developing and managing contract processes, coordinating with local government, non-profits, and tribes on grant planning issues. The position also performs a variety of other duties as assigned. The position reports to the Financial Section Supervisor and does not directly supervise other agency personnel.

### **Essential Functions (Major Duties or Responsibilities):**

#### **PLANNER 1.1 - LEVEL II**

#### **Planning Services - 75%**

- Evaluates local applications and recommends action on applications to the supervisor, FTA, and other interested parties based on review and evaluation of application elements compared to MDT and federal transportation planning standards, program progress to date, related funding and technical assistance efforts and proposed program outcomes.
- Assists in developing and monitoring program budgets by reviewing allocations, recommendations from sub-grantees, project plans and objectives, funding agreements, contract amendments, and expenditures.
- Recommends allocations to ensure adequate support is provided, and to ensure program compliance with federal, State, and MDT laws, regulations, and policies by reviewing current

policies and practices in relation to State and federal mandates and applicable legislation and mission mandates.

- Provides information, project planning, and staff support to local governments and agencies, MDT management, and FTA to facilitate effective program planning, optimize funding, and communicate on work progress and problems encountered by agencies.
- Monitors and coordinates oversight of grant program activities through process reviews and personal review of reports and performance measurements; reviewing and documenting budget or goal changes; recommending program guidelines and alterations; and implementing corrective actions as necessary.
- Provides technical support to planners for committee meetings, annual transit workshops, and/or specialized trainings.
- Provides support to planners on vehicle inventory, titling and lien filing procedures.
- Prepares and provides oversight on the National Transit Database (NTD) annual report by submitting current transit agencies financial and performance data through the Transit Award Management System (TrAMS).

### **Financial Management and Reporting - 25%**

- Reviews federal transit planning project reports and activities to ensure compliance with contracts and regulations.
- Reviews sub-recipients quarterly reports for proper completion, timeliness, and accuracy.
- Reports specific program problems/successes to MDT management through the annual performance report for review and submission to the federal agencies; specialized reports including budget amendment reports; and recommendations for alterations to programs based on observations.
- Reviews accounting and other related systems to ensure that transactions are correct and accurate. Evaluates financial transactions to ensure financial activities are processed in an accurate and timely manner.
- With guidance from the fiscal planner reconciles, adjusts, and corrects SABHRS and internal accounting systems to ensure the integrity and accuracy of accounting data and transactions.

### **PLANNER 1.2 - LEVEL III**

#### **Planning Services - 60%**

- Analyzes state and federal transportation planning issues to develop applications for federal transit grant funds.
- Develops grant applications and/or reviews proposals prepared by local governments to seek additional program funding through federal sources.
- Researches work programs for prior fiscal content and federal compliance to make recommendations to the supervisor and FTA on local government and local agency work programs.

- Evaluates local applications and recommends action on applications to the planners, FTA, and other interested parties based on review and evaluation of application elements compared to MDT and federal transportation planning standards, program progress to date, related funding and technical assistance efforts and proposed program outcomes.
- Assists in developing and monitoring program budgets by reviewing allocations, recommendations from sub-grantees, project plans and objectives, funding agreements, contract amendments, and expenditures.
- Recommends allocations to ensure adequate support is provided, and to ensure program compliance with federal, State, and MDT laws, regulations, and policies by reviewing current policies and practices in relation to State and federal mandates and applicable legislation and mission mandates.
- Analyzes funding and researches historical data, pending legislation, transportation planning studies, and other sources to identify program fiscal needs in conjunction with constituents and partner agencies throughout the state, determine spending authority requirements, make local programs aware of fiscal status, and assist in prioritizing projects based on need.
- Provides information, project planning, and staff support to local governments and agencies, MDT management, and FTA to facilitate effective program planning, optimize funding, and communicate on work progress and problems encountered by agencies.
- Monitors and coordinates oversight of grant program activities through process reviews and personal review of reports and performance measurements; reviewing and documenting budget or goal changes; recommending program guidelines and alterations; and implementing corrective actions as necessary.
- Researches and examines federal regulations, FTA circulars, restrictions, USCs, CFRs, state laws, spending authorities, and other written documents to review and disseminate transportation planning-related data to local programs and organizations.
- Prepares program information and outreach materials for signature for local projects to keep them apprised of changes in regulations or accepted practices and coordinate information necessary for State and federal administration.

### **Financial Management and Reporting - 40%**

- Reviews federal transit planning project reports and activities to ensure compliance with contracts and regulations.
- Reviews sub-recipients quarterly reports for proper completion, timeliness, and accuracy.
- Reports specific program problems/successes to MDT management through the annual performance report for review and submission to the federal agencies; specialized reports including budget amendment reports; and recommendations for alterations to programs based on observations.
- Compiles and maintains performance indicators for in-house planning to provide program data for external customers, identify problems or delays that may affect project completion, and provide required information to federal agencies.
- Establishes and maintains controls to ensure the timeliness, accuracy, and regulatory compliance of financial activities by researching and analyzing problems and designing and/or identifying solutions.
- Allocates annual appropriations from FTA to properly establish project funding and properly

reflect project funding according to state and federal requirements. This involves interpretation of state and federal sections of law requiring variable accounting and reporting procedures.

- Analyzes the impacts of changes in accounting procedures, policies, and regulations and recommends courses of action or change and implementation strategies to management.
- Reviews accounting and other related systems to ensure that transactions are correct and accurate.
- Reconciles, adjusts, and corrects SABHRS and internal accounting systems to ensure the integrity and accuracy of accounting data and transactions.
- Prepares various financial schedules and reports by compiling, manipulating, and collecting fiscal data. Reviews and interprets State and federal accounting and reporting guidelines and develops reporting functions.
- Prepares monthly, quarterly, and annual financial reports for all programs administered by the Section to provide necessary information and to ensure compliance with reporting requirements.
- Monitors subrecipients' operations and activities to ensure compliance with federal reporting requirements.

## **PLANNER 2.1 - LEVEL IV**

### **Planning Services - 50%**

- Analyzes state and federal transportation planning issues to develop applications for federal transit grant funds and state planning funds.
- Develops grant applications and/or reviews budgets prepared by local agencies to seek transportation funding through federal/state sources.
- Researches work programs for prior fiscal content and federal compliance to make recommendations to the supervisor, and FTA on local government and local agency coordinated programs.
- Reviews local applications and recommends action on applications to the supervisor and based on review and evaluation of application elements compared to MDT and federal transportation standards, milestone progress to date, related funding, and technical assistance efforts.
- Develops and monitors program budgets by reviewing allocations, recommendations from sub-grantees, project plans and objectives, funding agreements and expenditures. Develops allocations to ensure adequate support is provided, and to ensure program compliance with federal, state, and MDT laws, regulations, and policies by reviewing current policies and practices in relation to state and federal mandates and applicable legislation and mission mandates.
- Analyzes funding and researches historical data, pending legislation, transportation planning studies, and other sources to identify program fiscal needs in conjunction with local agencies throughout the state, determine spending authority requirements, make local programs aware of fiscal status, and assist in prioritizing projects based on need.
- Serve as a technical resource and MDT representative for various planning customers by providing information, project planning, and staff support to local governments and agencies, MDT management, and FTA to facilitate effective program planning and optimize

funding.

- Monitors and coordinates oversight of grant program activities through process reviews and personal review of reports and performance measurements; reviewing and documenting budget; recommending program guidelines and alterations; and implementing corrective actions as necessary.
- Researches and examines federal regulations, FTA circulars, restrictions, CFRs, state laws, spending authorities, and other written documents to review and disseminate transportation-planning-related data to local programs and organizations. Prepares program information and outreach materials for local projects to keep them apprised of changes in regulations or accepted practices and coordinate information necessary for state and federal administration.

### **Contract and Budget Oversight - 50%**

- Reviews federal transit and planning project reports and activities to ensure compliance with contracts and regulations. Reviews subrecipients' quarterly reports for proper completion, timeliness, and accuracy.
- Reports specific program problems/successes to MDT management through the annual/quarterly performance report for review and submission to the federal agencies; specialized reports including budget amendment reports; and recommendations for alterations to programs based on observations.
- Compiles and maintains performance indicators for in-house planning to provide program data for external customers, identify problems or delays that may affect project completion, and provide required information to federal agencies. Compiles other indicators as required through personal interview or verbal or written surveys.
- Establishes and maintains controls to ensure the timeliness, accuracy, and regulatory compliance of financial activities by researching and analyzing problems and designing and/or identifying solutions
- Allocates annual appropriations from local agencies and FTA to properly establish project funding and properly reflect project funding according to state and federal requirements.
- Analyzes the impacts of changes in accounting procedures, policies, and regulations and recommends courses of action or change and implementation strategies to management.
- Reviews accounting and other related systems to ensure that transactions are correct and accurate. Evaluates financial transactions to ensure financial activities are processed in an accurate and timely manner. Develops and recommends corrective actions to appropriate parties.
- Reconciles, adjusts, and corrects SABHRS and internal accounting systems to ensure the integrity and accuracy of accounting data and transactions.
- Prepares various financial schedules and reports by compiling, manipulating, and collecting fiscal data. Reviews and interprets state and federal accounting and reporting guidelines and develops reporting functions.
- Proficiency in the FTA reporting system known as Transportation Awards Management System (TrAMS)
- Independently prepares the program of projects and submits through the TrAMS system.
- Prepares monthly, quarterly, and annual financial reports for all federal programs

administered by the section to provide necessary information and to ensure compliance with reporting requirements.

## **PLANNER 3.0 - LEVEL V**

### **Planning Services - 50%**

- Coordinates and delivers financial guidance statewide and serves as the lead staff representative/liaison on financial management issues.
- Reviews and provides comments on major Transportation Development Plans (TDP) to ensure federal and financial program compliance is incorporated into project planning and implementation.
- Independently administers all transit grants funding in the Transportation Awards Management System (TrAMS). Ensures that all FSR's and milestone reports are complete and submitted on a timely basis and applies to FTA for grant funding for all statewide transit activities.
- Attends and speaks on behalf of the Department at transportation advisory committee meetings and provides technical and financial information on regulatory and financial compliance issues. Supports the Bureau Chief and/or supervisor at these meetings and keeps them informed through reports of local planning issues and their effect on project priorities.
- Attends meetings and conferences: discusses department operations, proposals and methods; resolves transportation related problems; and ensures programs are coordinated to meet federal and state legislative requirements.
- Independently prepares funding agreements, memorandums of understanding, and contracts with local governments to define roles, responsibilities, and funding commitments for urban transportation development plans, special transportation studies, and research projects. Develops grant applications and/or reviews proposals prepared by local governments to seek additional program funding through federal sources.
- Reviews contracts for studies that require consultant services and administers consultant services contracts for transportation planning efforts.
- Critically reviews MDT planning activities to ensure consistency with federal and State requirements and resolve inconsistencies. Researches and examines federal regulations, FTA circulars, restrictions, CFRs, state laws, spending authorities, and other written documents and develops related position papers, reports, and studies supporting transportation planning efforts.
- Develops, manages, and updates the Transit Sections internal program processes, grant funding and procedures documentation to address the Statewide Transportation Improvement Program (STIP).
- Monitors and coordinates oversight of grant program activities through financial reviews and personal review of reports and performance measurements; reviewing and documenting budget or goal changes; recommending program guidelines and alterations; and implementing corrective actions as necessary.

### **Contract and Budget Oversight - 50%**

- Reviews federal transit planning project reports and activities to ensure compliance with contracts and regulations.
- Reviews subrecipients' quarterly reports for proper completion, timeliness, and accuracy. Identifies issues based on these reviews and resolves any issues.
- Reports specific program problems/successes to MDT management; develops specialized reports including budget amendment reports; and recommendations for alterations to programs based on observations.
- Compiles and maintains funding scenarios for project specific budgets to support management decisions, stakeholder communications, and project specific agreements.
- Establishes and maintains controls to ensure the timeliness, accuracy, and regulatory compliance of financial activities by researching and analyzing problems and designing and/or identifying solutions. Evaluates funding based on GAAP and GASB requirements and pronouncements.
- Allocates annual appropriations from FTA to properly establish project funding and properly reflect project funding according to state and federal requirements through the TrAMS system.
- Analyzes the impacts of changes in accounting procedures, policies, and regulations and recommends courses of action or change and implementation strategies to management. Implements and provides guidance to internal and external personnel on these approved strategies.
- Reviews and monitors accounting and other related systems to ensure that transactions are correct and accurate. Evaluates financial transactions to ensure financial activities are processed in an accurate and timely manner. Develops and recommends corrective actions to appropriate parties. Reconciles, adjusts, and corrects SABHRS and internal accounting systems to ensure the integrity and accuracy of accounting data and transactions.
- Independently prepares monthly, quarterly, and annual financial reports for all federal programs administered by the section to provide necessary information and to ensure compliance with reporting requirements.

## **Supervision**

The number of employees supervised is: N/A

The position number for each supervised employee is: N/A

## **Physical and Environmental Demands:**

- Lifting (less than 25 lbs.)
- Remaining seated for extended periods of time, with occasional walking; standing; bending
- Travel within the state to project location
- Communicate in writing, in person, and over the phone
- Occasional bus inspection requires crouching, bending, reaching, stooping

### **Knowledge, Skills and Abilities (Behaviors):**

- Requires knowledge of the principles and practices of transportation planning; public administration; project management, budgeting, and planning; statistical and demographic analysis methods; economics; and State and federal laws and regulations pertaining to Division programs and operations (e.g., Titles 23 and 49 USC, Title 60 MCA, MEPA/NEPA requirements, etc.).
- Requires specialized knowledge of federal-aid transportation programs, eligibilities, and reimbursement; organizational functions, operations, and relationships within MDT; and local and tribal government operations.
- Requires skills in budgeting, program management, project implementation, and administering a variety of project objectives and requirements; and written and verbal communication.

### **Minimum Qualifications (Education and Experience):**

#### **PLANNER 1.1 - LEVEL II**

The required knowledge and skills are typically acquired through a combination of education and experience equivalent to Bachelor's Degree in Planning, Geology, Geography, Computer Science, Computer Information Systems, Business, Economics, Education, Public Administration, Mathematics, Finance, Accounting, Statistics, Social or Physical Science, Engineering, Land Use Planning, or Resource Management or a related field.

This position does not require any related work experience.

#### **PLANNER 1.2 - LEVEL III**

The required knowledge and skills are typically acquired through a combination of education and experience equivalent to Bachelor's Degree in Planning, Geology, Geography, Computer Science, Computer Information Systems, Business, Economics, Education, Public Administration, Mathematics, Finance, Accounting, Statistics, Social or Physical Science, Engineering, Land Use Planning, or Resource Management or a related field.

This position requires a minimum of 1 year of related work experience.

#### **PLANNER 2.1 - LEVEL IV**

The required knowledge and skills are typically acquired through a combination of education and experience equivalent to Bachelor's Degree in Planning, Geology, Geography, Computer Science, Computer Information Systems, Business, Economics, Education, Public Administration,



Mathematics, Finance, Accounting, Statistics, Social or Physical Science, Engineering, Land Use Planning, or Resource Management or a related field.

This position requires a minimum of 3 years of related work experience.

**PLANNER 3.0 - LEVEL V**

The required knowledge and skills are typically acquired through a combination of education and experience equivalent to Bachelor’s Degree in Planning, Geology, Geography, Computer Science, Computer Information Systems, Business, Economics, Education, Public Administration, Mathematics, Finance, Accounting, Statistics, Social or Physical Science, Engineering, Land Use Planning, or Resource Management or a related field.

This position requires a minimum of 4 years of related work experience.

Alternative qualifications include: Any combination of additional related work experience and education equivalent to the minimum qualifications.

**Special Requirements:**

- ☐ Fingerprint check
- ☒ Valid driver’s license
- ☐ Background check
- ☐ Other; Describe
- MFPE Union Code
- Safety Responsibilities

The specific statements shown in each section of this description are not intended to be all inclusive. They represent typical elements and criteria considered necessary to perform the job successfully.

**Signatures**

My signature below indicates the statements in the job description are accurate and complete.

Immediate Supervisor

Title

Date

Administrative Review

Title

Date

My signature below indicates that I have read this job description.

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Employee	Title	Date
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**Human Resources Review**

**Job Code Title: Transportation Planner**

**Job Code Number: E39011, E39012, E39013      Pay Level: 1.1, 1.2, 2.1, 3.0**

My signature below indicates that Human Resources has reviewed this job description for completeness and has made the following determinations:

- |  |  |
|--|--|
| <input type="checkbox"/> FLSA Exempt                   | <input checked="" type="checkbox"/> FLSA Non-Exempt    |
| <input checked="" type="checkbox"/> Telework Available | <input type="checkbox"/> Telework Not Available        |
| <input type="checkbox"/> Classification Complete       | <input type="checkbox"/> Organizational Chart attached |

**Human Resources:**

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Signature	Title	Date
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