

Position Specification
Tolling Program Manager



The Engagement

J. Tedesco & Associates has been retained by The Oregon Department of Transportation (ODOT), headquartered in Salem, Oregon, to lead their recruitment for the position of Tolling Program Manager. The position will be based in Portland. ODOT is seeking a talented program leader with solid experience implementing a tolling program and who has the leadership competencies and proven experience to oversee an organization of this size and complexity. In addition, the agency is seeking someone who is equally skilled at managing relationships with a diverse array of internal and external stakeholders. J. Tedesco & Associates is a boutique, retained executive search firm, founded in 1998, based in San Diego. Our firm has significant experience working with public agencies, and we lead assignments from the emerging leader level up to the administration and board level.

Client Overview

The Oregon Department of Transportation is an award-winning organization with more than 4,500 employees and a \$3.8B biennial budget. Together, the employees of ODOT work to provide a safe, efficient transportation system that supports economic opportunity and livable communities for Oregonians. Transportation in Oregon is a multi-billion dollar investment in its residents, environment and state. Almost every aspect of life is affected one way or another by transportation. With 96,000 square miles of land, Oregon must have a safe, dependable system – that includes highways, passenger and freight rail, public transit and non-motorized transportation. Over the past several years, Oregonians have opted to invest in the state's transportation infrastructure, which is providing the opportunity for the ODOT to greatly enhance the livability and transportation needs within the state.

ODOT provides comprehensive planning, design, construction, maintenance, and operation of the transportation system to serve the public of the State of Oregon. The agency carries out these activities under the direction of the Oregon Transportation Commission. ODOT's eight divisions include Communications, Central Services, Driver and Motor Vehicle Services, Motor Carrier, Transit/Rail, Transportation Development, Transportation Safety, and Highway Division. ODOT is committed to supporting a workplace environment that encourages a

diverse workforce. This support focuses on respectful treatment of others, reducing conflict by increasing the understanding of and respect for differences amongst all people.

The leadership team at ODOT is collegial and has great respect for one another. It is a culture where everyone can raise their hand, it is an organization that encourages one another to put their different perspectives on the table. It is non-combative and a healthy culture of openness and encouragement.

More information about the Oregon Department of Transportation can be found online at: www.oregon.gov/ODOT

About the ODOT Highway Division and the New Office of Urban Mobility

The Highway Division at ODOT is comprised of 2,700 employees, and it operates and maintains approximately 8,000 miles of highways throughout the state of Oregon. The highway system is as diverse as the state itself. It ranges from six-lane, limited-access freeways with metered entrances in the Portland area, to a graveled state highway in central Oregon. Oregon's economy and industries – including agriculture, timber, tourism, and technology – all depend on a sound highway system. Oregon has more than 74,000 miles of roads owned by federal, state, county and city governments. State highways comprise less than 11 percent of total road miles, but carry 58 percent of the traffic and more than 20.7 billion vehicle miles a year.

The 2017 Oregon Legislature passed Keep Oregon Moving (HB 2017) which made a significant investment in transportation - \$5.3Billion in 10 years. The Highway Division is tasked with delivery of projects that focus on pavements, bridges, seismic, safety and congestion relief projects. Several mega projects in the Portland region were identified for funding or future funding. As a result of HB2017 and the increase demands on the transportation system, the Oregon Transportation Commission has also been pursuing the development and implementation of a Tolling Program in the Portland Metro area.

Organizationally, the Highway Division has an administrator who oversees this new office of Urban Mobility and Mega Project Delivery, along with five regional offices and the headquarters office. In the past, the agency had completed most engineering and design work in-house while contracting with private companies for the actual construction of projects. With HB 2017, the outsourcing of project delivery will increase from the current 50 to roughly 70 percent.

Setting up the office of Urban Mobility and Mega Project Delivery comes in response to House Bill 2017, the mega projects that are currently funded, additional mega projects in the future, the implementation of tolling in the Portland Metro area, and how ODOT can be prepared as

Oregon and Washington renew their efforts to replace the aging Interstate 5 Bridge that connects the two states.

Key Issues and Trends this Leader and their Team Must Navigate:

Oregon currently does not have tolling. Tolling has not been in the state of Oregon since 1950-1960s - back then it was on some bridges. There are some big challenges as a result. A combination of challenges around the implementation of such a large new program - what it looks like, how it operates, communicating with key constituents and the community. The Tolling budget is a little unknown - 100M is listed, but it could be less or more - it will change over time based on the model they implement

About Salem, Oregon and the Willamette Valley Corridor:

ODOT is headquartered in Salem, Oregon. Located in the heart of the Willamette Valley, Salem is the capital city of Oregon. Thanks to its central location, easy access to Interstate 5 and major transportation hubs, easy-going lifestyle and strong business community, Salem is at the center of it all. Salem has a population of more than 160,000, it is 47 miles south of Portland and an hour from the Cascade Mountains and the ocean beaches. Salem is in the midst of sustained, steady growth. Ongoing preservation of historic downtown buildings, along with a downtown core master plan for residential and commercial development, ensures managed growth. The Willamette Valley Corridor is a diverse region with well-established, family-friendly neighborhoods, access to good schools and universities, and all areas have a small-town feel. Paired with a high quality of life and an endless bounty of outdoor activities, the Willamette Valley is a great place to live and work.

About Portland, Oregon:

This position will be based out of the Portland, Oregon office location. Portland and its neighboring areas have beautiful scenery, safe communities, good schools, world-class food and drink, clean air, and plenty of outdoor recreation with the beach 2 hours away and the mountains/skiing 1+ hour away. Portland has a great sense of community that is built on the hearts of kind people and a unique culture that fosters diversity. Portland is recognized as one of America's most bike-friendly cities, and provides an environment for outdoor activities galore, from hiking, mountain biking, fishing, white water rafting, skiing and more. For those foodies, Portland has great restaurants and they take their coffee and micro-brewed beers seriously. In addition, numerous wineries are within a short drive, most being between Portland and Salem. From a commerce standpoint, business is booming: Greater Portland has become a talent magnet. The workforce is growing at 6x the national average. Portland, and the greater region is a wonderful place to call home.

Position Summary

This position will lead the Oregon tolling program through its next phase – program build and program setup. Intermediate work is focused on specific locations, but it must be completed to set ODOT up for broader implementation possibilities in the future. Acute political acumen will be needed to guide ODOT through robust stakeholder engagement, including addressing the needs of the public, Oregon lawmakers and decision leaders. This individual will also need exceptional project-management skills and experience to guide the tolling system through NEPA and system-build and testing.

- Manage and direct the ODOT tolling effort and staff to ensure the successful development and delivery of a tolling system. The Tolling Program Manager determines and develops policy, program priorities, and utilization of resources in order to launch a successful tolling system. This position leads, manages, directs, and controls all tolling benefits and impacts on behalf of ODOT.
- On a daily basis, this position manages a program staff that ranges from 10 at start-up to approximately 60 during peak execution. In addition, there will be several consultant staff during the program lifecycle. This complexity will require exceptional communication and collaboration throughout the project. The Tolling Program Manager also has the responsibility of providing tolling strategic direction and management of all tolling functions, including direct employee supervision and program performance management.
- The Tolling Program Manager is also responsible for developing a tolling system, including a new back office, customer service center, and toll points on authorized toll roadways; as well as developing and sustaining effective partnerships with internal and external stakeholders to successfully deliver tolling. This requires successful program conflict resolution, problem solving, change management and team building among executive level staff. This individual and their staff must demonstrate these qualities with the media, ODOT Executive Management, Oregon Transportation Commission, members of the PAC, state legislative members and committees, ODOT DMV, Oregon State Patrol, DAS, other toll agencies, transit agencies, local agencies and state DOTs, and the public.
- Projects with major IT components, like tolling, must adhere to regular legislative and State CIO's Office oversight and reporting. The position will be responsible for ensuring that effective relationships are established with executive and legislative branch stakeholders, and that all requirements are met in a timely way with quality deliverables. Tolling will interface with local government, motor carrier transit, financial institutions, and other state agencies such as Treasury, Department of Environmental Quality, Oregon State Police, etc. The position is also responsible for ensuring that key business partners are brought into project discussions early.
- Actions by the individual in this position will have an effect on billions of dollars in toll financing and revenue collection. This individual is responsible for development and oversight of ODOT's Toll Program, and program budget.

Here is a website link the outlines this initiative:

<https://www.oregon.gov/ODOT/Pages/Value-Pricing.aspx>

Position Location

Portland, Oregon. In addition, considerable time will be spent in Salem, Oregon along with travel throughout the state of Oregon

Responsibilities (Duties/ Accountabilities):

50% Project Management

Direct, manage and lead all project management functions within the Tolling Program, Highway Division. Direct and coordinate all governance processes related to tolling, including making recommendations to the leadership steering committees and external advisory group. Responsible for ensuring successful implementation of tolling recommendations made through the governance process.

Components include:

- * Perform human-resources-related functions, including selection, training, coaching, developing, and, if necessary, disciplining and terminating program staff.
- * Prepare, engage, manage, and communicate plans to address issues of equity in the implementation of the program, from both inside the program staffing ranks to those using the system. Provide understanding for potential populations that would use the system, specifically, but not limited to low income and historically disadvantaged communities.
- * Plan, develop, implements and administer project, procedures and guidelines to help align staff with the strategic goals of the agency.
- * Perform all budget-related functions, including budget development, budget management and monitoring, budget negotiation and adjustment, and timely response to budget-related questions for the tolling project.
- * Develop, establish and implement policies, procedures, standards, methods, and tools for project management activities. Ensure that project management practices are consistent with applicable governance and industry best practices.
- * Lead ODOT through the NEPA process for the tolling effort, which includes robust public engagement, stakeholder involvement, and navigating the project through a politically sensitive environment.

* Determine and direct the overall strategy and objective for delivering the tolling program including the planning, development, and implementation of all phases of project/program management. Functions include developing and managing scope, staffing plans, risk management strategies, budget oversight, project management guidance and reporting.

* Interface with ODOT Information Systems Branch, Information Technology contractors, vendors, information systems managers/staff, project managers, and project leads.

* Establish a set of performance metrics for tolling. Metrics will measure project outcomes as well as support efforts to transparently report progress managing tolling's scope, schedule and budget.

* Interact with elected officials, interest groups, advisory committees, and other stakeholders to listen, inform and advocate for tolling

25% Contract Management

Negotiate and manage multi-year, multi-million dollar vendor contracts that support tolling success and initiatives. Responsible for procurement, negotiation and execution for several highly complex contracts that will contribute to the tolling project. Develop effective working relationships with on-site consultant partners. Ensure all procurement activities are coordinated through ODOT Procurement Officer and are in alignment with State Procurement requirements.

10% Tolling Program Build

Set up policies and procedures for an operational tolling program. This includes establishing the work streams of a functional operational tolling program: customer service, communication, policy, finance, system management and maintenance, roadside equipment management and maintenance, and overall program management. Set the program up to operate the system safely, securely, and efficiently, meeting the needs and convenience of Oregon toll customers.

5% Strategic Planning and Executive ODOT Leadership

Be an active member of ODOT's senior leadership team. Coordinate and participate in ODOT strategic planning functions with ODOT's senior management team. Embrace and deliver a "One ODOT" culture across Divisions and teams. Ensure linkage between tolling priorities and ODOT strategic and Oregon enterprise-level planning efforts.

Participate in IT-focused and general strategic and tactical planning efforts within ODOT. In addition, stay informed on emergency agency trends, and maintain communication with HQ communication and government relations efforts.

Working Conditions

ODOT believes in a diverse and inclusive work environment. All employees are expected to contribute to a work environment that collectively values and benefits from respecting its diversity and promotes a culture of inclusiveness. Standard office working environment with occasional overnight travel (primarily in-state, but could include some out-of-state travel). This position operates in a typical office environment, with a heightened need for transparency and accountability. Work often involves multitasking, short timelines, strict deadlines, and the need to deal with conflicting priorities. Includes scheduled or unscheduled weekend work and working before and after the normal scheduled shift. Long hours could be required for certain initiatives. May require contact with agitated customers, co-workers and vendors. Business needs may necessitate being on-call after hours. This type of work requires extensive use of desktop computing systems. Requires the ability to work and make decisions independently in accordance with established guidelines, as well as collaborate and work on a team. Requires driving on an as-needed basis to respond to problems and provide service at varying locations throughout the state.

Guidelines Used in This Position

Oregon Revised Statutes Administrative Rules, ODOT Policies and Procedures, State Policies and Procedures, ODOT FHWA Application for Tolling, Tolling Systems & Planning Processes and Procedures, Tolling System Requirements and other Documentation, Bill Analysis Handbook Roles and Responsibilities, ODOT Procurement Office Manuals and Procedures, Project Management Guide, Systems Modernization Plan, Employee Expectations, System Objectives and Functional Principles, Ethical Decision Making Model, FASM Procedure Manual, Collective Bargaining Agreement, ODOT Strategic Plans, Oregon Transportation Plan, Oregon Highway Plan, NEPA and PEL

Regular Contact Points

Oregon Legislators and Decision Makers and Staff (potentially WA members also), FHWA & FTA, Oregon Transportation Commission, PAC Members, Local Community Leaders, ODOT Executive Management and ODOT Matrix staff (IS, OPO, Central Services, Region 1, etc.), Tolling Staff, Vendors/Consultants, Special Interest Groups, DAS/LFO and the Media.

Decision Making for the Position

The individual in this position will make high-profile decisions about the direction of ODOT's tolling program, one of the most complex and high-profile public-facing efforts underway at the

department. Ultimate success of this controversial effort will require effective decision-making and execution by this individual. Decisions made by this position determine the quality and effectiveness of the tolling project. On a day-to-day basis, the position will function independently with significant responsibility for decision-making. The position also makes a variety of practical, administrative decisions regarding staff, contracts, contractors, budgets, and overall project prioritization and staffing. This position will lead the Planning and Environmental Linkage (PEL) and National Environmental Policy Act (NEPA) process for the identified tolling project areas. This will consist of advanced planning, tolling-concept refinement, detailed traffic and revenue analysis, and extensive community engagement. This will require close coordination with Portland stakeholders and FHWA partners to determine the appropriate class of NEPA review and address public concerns. A successful NEPA review is needed before the tolling system can be built and implemented, and traffic and revenue analysis is needed to enable the agency to bond against toll revenue.

While PEL/NEPA and traffic/revenue analysis are in process, this position will need to expertly guide decision-makers and the Oregon public on tolling policy decisions, such as: vehicle exemptions, type of tolling pricing (dynamic versus variable), toll rate caps, equity and mitigation, times of enforcement, system interoperability and reciprocity, and enforcement. These efforts will be informed by the PAC's mitigation strategy recommendations, along with ongoing research and staff work.

The tolling system work will be extensive and will require strong leadership skills. Tolling will be one of the biggest information technology projects in the state. A tolling system begins at vehicle identification and concludes at driver payment of tolls to the state. This effort consists of requirement gathering, which will enable the tolling system to be interoperable with Washington's tolling system and possibly with other Oregon-operated transportation systems (such as OReGO and HOP Pass), system build, system test, and implementation.

Decisions made by this individual will ultimately affect nearly every Portland resident and users of two major interstates that are key to the economy of not only Oregon, but also the entire western United States. This position will be accountable for:

- Managing complexity associated with multi-county, bi-state, and statewide stakeholder engagement over a long-term program timeline, program ramp-up and ramp-down, and creation of a new line of business for ODOT.
- Procuring competent agency and consultant expertise and IT products and establishing effective vendor relationships and processes for contracts management and fiscal reporting.
- Ensuring rigorous risk identification and mitigation, project management and scope controls.

- Overseeing a multi-level governance structure that includes: an external committee composed of key stakeholders, DAS and Legislative Fiscal IT project oversight entities, and legislators; and internal steering committees composed of senior leaders responsible for decisions related to scope, schedule and budget for the tolling effort.

Tolling is a highly visible and massive undertaking for the state. ODOT is looking for a leader who is agile and adaptable and can provide charisma, expertise, and vision to manage and lead the tolling team to build a successful system that will seamlessly operate on two major interstates. The tolling program is expected to continue as part of ODOT's ongoing business model and is expected to cost over \$100 million to implement, and manage revenues in excess of hundreds of millions per biennium.

Impacts of the Decision Making

These decisions affect Portland & SW Washington residents, the economy dependent on the I-5 and I-205 corridors, and the Department and the state as a whole; decisions affect multiple divisions within the agency, many state agencies, the general public, and other external state and federal agencies. Poor decision-making and unsuccessful implementation may result in failure of a high-profile legislative mandate, as well as an opportunity to raise revenue and maintain Oregon's transportation infrastructure and lead to poor public perception of State Government programs and projects

Size of the department

This position will oversee a team of 15 individuals that will build over time in addition to external consultants and their teams.

Reporting Structure

- This position reports directly to the Director of the Office of Urban Mobility and Mega Project Delivery. That person reports to the Highway Division Administrator and the ODOT Director.

Qualifications and Skills:

Position requirements include:

- Six years of management experience in a public or private organization, which included responsibility for development of program rules and policies, development of long- and short-range goals and plans, program evaluation and budget preparation.
- A valid driver license, an acceptable driving record, and the ability to drive is required for this position.

Desired attributes:

- A bachelor's degree in Civil Engineering or Urban and Regional Planning, or Transportation Planning, or Public Policy & Administration, or business administration, or related field is required, a master's degree in related fields listed above preferred.
- Registration as a Professional Engineer (PE) and/or AICP certification preferred.
- Experience building a large program from the ground up, **SUCH AS** Someone from a California Metropolitan Planning Organization (MPO) or a Mass Transit Agency who has rolled out a large capital program and new service. Maintaining a tolling program or ideally, building a tolling program is strongly preferred, which might be someone from a toll authority or a state DOT that has tolling. It might also be someone from a private firm that manages tolling programs.
- Must be able to get up to speed quickly on tolling if no prior tolling experience
- Must come in with eyes wide open since this is essentially a new program for the agency and the state (since it was last done approximately 60 years ago). Utilize good anticipation skills to be prepared for all aspects of what rolling out a new tolling program will entail
- Must good strong at building relationships with key stakeholders, not only external, but also must be strong at building internal relationships (getting things done internally)
- Substantive experience in Program and project budgeting.
- Outstanding written and verbal communication skills.

Position attributes include:

- ❖ Partnership focus – highly motivated to engender strong, two-way positive relationships
- ❖ Visionary leader that creates space and reason for others to follow
- ❖ Must have an appetite to break new ground
- ❖ Highly skilled in recognizing system needs, partner needs and community needs, regardless of which agency or group has system component oversight
- ❖ Exceptional skill in taking calculated risks in the advancement of the future of transportation for the region
- ❖ Exceptional ability to collaborate and drive an approach to durable decisions in a complex environment of competing interests
- ❖ Experience in leading and growing a diverse team with encouragement to innovate, collaborate, embrace diversity
- ❖ Charismatic, energetic and approachable communicator; interpersonal communication expert
- ❖ Ability to grow a group, from conception, to a delivery
- ❖ Politically savvy problem solver and coalition builder
- ❖ Adaptable problem solver who creates and manages a dynamic environment
- ❖ Creative in the path to resolutions
- ❖ Experience in prosecuting change, both inside the agency and for external audiences. A solid understanding of how to build the agency brand.

SKILLS & COMPETENCIES:

- Honest, straight forward, transparent and genuine communication style
- Effective advocacy skills to advance ODOT's position or interests.
- Relationship motivated and focused
- Develops effective working relationships in a collegial environment
- A team player and works collaboratively across a complex organization to obtain results
- Demonstrates high integrity in all interactions and decisions
- Models and executes a safety focused culture
- Adaptable to change and has a forward-looking leadership approach
- Possesses a nice level of energy and infuses that into the positive direction of the business
- Demonstrated ability to see things from all angles and then act accordingly
- Builds and maintains relationships with diverse external stakeholders
- Challenges that status quo, but does so in respectful ways
- A leader who looks at their job as serving something greater than oneself
- Fosters critical thinking
- Solution oriented and focuses on results
- Honors commitments they make as a leader (does what they say)
- Will be fair and just, and treat all people equally
- Will show up on the most challenging of days
- Effective at developing and leading a diverse workforce

The recruiting practices of J. Tedesco & Associates are AA/EEO compliant and are aimed at developing a diverse slate of candidates. Please direct any interest or inquiries to: Jon Tedesco, Managing Director of J. Tedesco & Associates - via email at JLT@tedescoassociates.com or call 858-812-5623.