



San Francisco Bay Area Rapid Transit District (BART) Principal Financial Analyst

SALARY	\$61.30 - \$79.69 Hourly \$4,904.06 - \$6,375.27 Biweekly \$10,625.45 - \$13,813.09 Monthly \$127,505.43 - \$165,757.06 Annually	LOCATION	BART Headquarters - 3rd Fl
JOB TYPE	Full-Time	JOB NUMBER	202300096
EXECUTIVE OFFICE	Capitol Corridor	COST CENTER	Capitol Corridor - Admin
OPENING DATE	03/01/2024	CLOSING DATE	Continuous
FLSA	Exempt	BARGAINING UNIT	1

Marketing Statement

Ride BART to a satisfying career that lets you both: 1) make a difference to Bay Area residents, and 2) enjoy excellent pay, benefits, and employment stability. BART is looking for people who like to be challenged, work in a fast-paced environment, and have a passion for connecting riders to work, school and other places they need to go. BART offers a competitive salary, comprehensive health benefits, paid time off, and the CalPERS retirement program.

Job Summary

Pay Rate

AFSCME Pay Band G

Annual Salary Range \$ 127,505.43 (Minimum) - \$ 165,757.06 (Maximum)

The negotiable salary offer will be between \$127,505.43 - \$151,482.76/annually commensurate with experience and education.

Reports To

Manager Budget and Administration

DEFINITION

Under general supervision, performs the most technical and complex tasks relative to assigned area of responsibility; may supervise, assign, review and participate in the work of staff responsible for providing professional level support on budget development and administration, financial analysis and project control work; ensures work quality and adherence to established policies and procedures; and performs related duties as assigned.

CLASS CHARACTERISTICS

This is the highest level within the Financial Analyst series. Positions at this master level perform the most complex duties assigned to the series or may be responsible for participating in supervising, assigning and reviewing the work of subordinate staff. Incumbents oversee the work of outside consultants or assisting higher-level managerial staff in planning and evaluating the quantity and quality of work performed by subordinate staff. Master level classes such as this are an extension of the advanced journey level class and often represent the highest non-supervisory tier or a specialized advanced journey level. Master level classes typically consist of non-supervisory principal positions. Positions in this class are flexibly staffed and can be filled by advancement from the advanced journey level, or when filled from the outside, by incumbents with prior full journey level experience.

Current Assignment

First review of applications will be on March 15, 2024

Capitol Corridor is an intercity passenger rail service connecting Auburn/Sacramento to Silicon Valley, including San Francisco, Oakland, and Berkeley. Fully funded by the State of California, Capitol Corridor receives administrative support from BART through a managing agency agreement and is a department within BART.

The Principal Financial Analyst will be an integral member of CCJPA's Finance Team performing the most complex duties assigned to the Financial Analyst series related to operating and capital budget development, administration, and reporting, financial analysis, and project control work; grant and funding administration and compliance; procurement and contract and compliance; ensuring work quality and adherence to policies and procedures; and performing related duties as assigned. The Principal Financial Analyst will provide consultation and training to CCJPA managers and staff on financial and procurement policies and procedures and may provide direction and oversight to subordinate staff. The Principal Financial Analyst may serve as the delegate for the Manager of Budget & Administration as needed.

The ideal candidate will demonstrate strong knowledge and experience in the following areas beyond the minimum qualifications:

- Experience performing complex financial, statistical, comparative and management analyses, and performing accurate complex financial calculations.
- Intermediate to advanced experience with data analytics, data visualization, and/or business intelligence tools. Ability to successfully analyze and verify data for accuracy and resolving budget discrepancies and issues; Experience with Oracle Business Intelligence preferred.
- Intermediate to advanced computer, financial database, and Excel skills with the aptitude to learn new systems quickly.
- Experience with grant development, administration, and compliance.
- Experience providing financial support for projects and/or programs with complex funding sources and compliance requirements.
- Experience preparing clear and accurate financial, budget, and grant reports and charts for internal and external stakeholders.
- Experience creating financial models, forecasts, or cost-benefit analysis.
- Focus on continuous improvement and providing high-quality customer service and support to internal and/or external customers.
- Effective verbal and written communication skills; Exceptional organizational skills and demonstrated ability to plan and organize work for self and others to ensure that work is completed efficiently and in a timely manner.

Selection Process

This position is represented by American Federation of State, County, and Municipal Employees (AFSCME). Applications will be screened to assure that minimum qualifications are met. Those applicants who meet minimum qualifications will then be referred to the hiring department for the completion of further selection processes.

The selection process for this position may include a skills/performance demonstration, a written examination, and/or an

individual or panel interview.

The successful candidate must have an employment history demonstrating reliability and dependability; provide copies of certificates, diplomas or other documents as required by law, including those establishing his/her right to work in the U. S.; pass a pre-employment medical examination which includes a drug and alcohol screen, and which is specific to the essential job functions and requirements. Pre-employment processing will also include a background check. (Does not apply to current full-time District employees unless specific job requires additional evaluations)

The selection process for this position will be in accordance with the applicable collective bargaining agreement.

Examples of Duties

1. Establishes schedules and methods for providing financial analysis services; identifies resource needs; reviews needs with appropriate management staff; allocates resources accordingly.
2. Participates in the development of policies and procedures; monitors work activities to ensure compliance with established policies and procedures; makes recommendations for changes and improvements to existing standards and procedures.
3. Recommends and assists in the implementation of goals and objectives; implements approved policies and procedures.
4. Conducts complex financial and management studies to evaluate District system performance and operating efficiency; prepares and presents study findings and recommendations; implements recommendations and provides assistance to District departments in assessing performance against stated objectives.
5. Performs the most technical and complex tasks of the work unit including specialized analyses and studies related to the District's budgeting, financial control and management analysis functions.
6. Provides financial oversight on assigned projects; identifies funding sources; projects cash flow requirements; maintains budgetary records for proposed projects; compiles actual project costs; performs financial, statistical and comparative analysis of actual and budgeted costs.
7. Participates in the preparation and administration of District-wide budgets; compiles and analyzes budget data; coordinates activities within other divisions and departments.
8. Analyzes contract provisions and change orders related to approved cost of work and budget allocations; analyzes and reports cost variances; ensures that cost control methods are implemented and applied to program objectives.
9. Develops and recommends improvements to computerized financial management system.
10. Participates in the selection of assigned staff; provides or coordinates staff training; works with employees to correct deficiencies; implements discipline procedures.
11. Prepares analytical and statistical reports on operations and activities.
12. Attends and participates in professional group meetings; stays abreast of new trends and innovations in the field of financial analysis and program management.
13. May plan, prioritize, assign, supervise, review and participate in the work of staff responsible for complex financial, statistical and project control analysis in assigned area.

Minimum Qualifications

Education:

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

Experience:

Four (4) years of (full-time equivalent) verifiable professional budgetary, financial or management analysis experience.

Substitution:

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

Knowledge and Skills**Knowledge of:**

- Operations, services and activities of a comprehensive budget and financial control program.
- Principles of supervision, training and performance evaluation.
- Principles of financial and operational analysis.
- Financial, statistical and comparative analysis techniques and formulas.
- Principles and practices of project budget development, administration and control.
- Advanced principles and practices of accounting.
- Principles and practices of financial project management and scheduling.
- Methods and techniques for assessing performance against established objectives.
- Current office procedures, methods and equipment including computers.
- Applicable computer software applications.
- Related Federal, State and local laws, codes and regulations.

Skill in:

- Selecting, supervising, training and evaluating staff.
- Performing complex financial, statistical, comparative and management analyses.
- Establishing and implementing procedures for budget and project control.
- Identifying funding sources for proposed and current projects.
- Performing accurate complex financial calculations.
- Developing, organizing and maintaining accurate financial records.
- Interpreting complex computerized records and reports.
- Interpreting complex contract provisions and change orders.
- Interpreting and explaining District policies and procedures.
- Preparing clear and concise financial and administrative reports.
- Operating office equipment including computers and supporting word processing and spreadsheet applications.
- Communicating

Benefits

The San Francisco Bay Area Rapid Transit District (BART) prides itself in offering best in class benefits packages to employees of the District. Currently, the following benefits may be available to employees in this job classification.

Highlights

- Medical Coverage (or \$350/month if opted out)
- Dental Coverage
- Vision Insurance (Basic and Enhanced Plans Available)
- Retirement Plan through the CA Public Employees' Retirement System (CalPERS)
 - 2% @ 55 (Classic Members)

- 2% @ 62 (PEPRA Members)
- Reciprocity available for existing members of many other public retirement systems (see BART website and/or CalPERS website for details)
- Money Purchase Pension Plan (in-lieu of participating in Social Security tax)
 - 6.65% employer contribution up to annual maximum of \$1,868.65
- Deferred Compensation & Roth 457
- Sick Leave Accruals (12 days per year)
- Vacation Accruals (3-6 weeks based on time worked w/ the District)
- Holidays: 9 observed holidays and 4 floating holidays
- Life Insurance w/ ability to obtain additional coverage
- Accidental Death and Dismemberment (AD&D) Insurance
- Survivor Benefits through BART
- Short-Term Disability Insurance
- Long-Term Disability Insurance
- Flexible Spending Accounts: Health and Dependent Care
- Commuter Benefits
- Free BART Passes for BART employees and eligible family members.

Equal Employment Opportunity GroupBox1

The San Francisco Bay Area Rapid Transit District is an equal opportunity employer. Applicants shall not be discriminated against because of race, color, sex, sexual orientation, gender identity, gender expression, age (40 and above), religion, national origin (including language use restrictions), disability (mental and physical, including HIV and AIDS), ancestry, marital status, military status, veteran status, medical condition (cancer/genetic characteristics and information), or any protected category prohibited by local, state or federal laws.

The BART Human Resources Department will make reasonable efforts in the examination process to accommodate persons with disabilities or for religious reasons. Please advise the Human Resources Department of any special needs in advance of the examination by emailing at least 5 days before your examination date at employment@bart.gov.

Qualified veterans may be eligible to obtain additional veteran's credit in the selection process for this recruitment (effective Jan. 1, 2013). To obtain the credit, veterans must attach to the application a DD214 discharge document or proof of disability and complete/submit the Veteran's Preference Application no later than the closing date of the posting. For more information about this credit please go to the Veteran's Preference Policy and Application link at www.bart.gov/jobs.

Agency

San Francisco Bay Area Rapid Transit District (BART)

Address

2150 Webster Street
4th Floor
Oakland, California, 94612

Phone

510-464-6112

Website

www.bart.gov/jobs

Principal Financial Analyst Supplemental Questionnaire

*QUESTION 1

Please describe your highest level of education.

- ☐ GED
- ☐ High School Diploma
- ☐ Some College
- ☐ Bachelors Degree
- ☐ Masters Degree

***QUESTION 2**

Referencing the previous question, please state the major of your degree. If you have no degree, enter "N/A."

***QUESTION 3**

Please choose the item below which best describes your "budgetary, financial, management analysis" experience.

- ☐ No Experience
- ☐ Less than 1 year
- ☐ 1-2 years
- ☐ 2-3 years
- ☐ 3-4 years
- ☐ 4-5 years
- ☐ 5-6 years
- ☐ 6-7 years
- ☐ 7-8 years
- ☐ More than 8 years

***QUESTION 4**

Share a specific example of a time when you conducted analyses of financial data using Excel, a database, or another data analytics or business intelligence software. Describe your methodology, the tools you used, and why you chose those tools. Please also share how you interpreted and explained the results of your analysis to peers and executives.

***QUESTION 5**

A Principal Financial Analyst collaborates with other staff across the organization to collect data, collaborate on projects, and execute the responsibilities of the position. Please share a specific example of a time when you had to collaborate with others to accomplish your project directives. Include how the complexity of fund sources and how regulations, policies, and other compliance requirements influenced your approach (i.e. federal, state, regional, local).

***QUESTION 6**

Please share a specific example of a time when you led a process improvement effort such as creating or improving upon templates, checklists, tracking sheets, or similar process improvement tools or data management technology implementation. Please include the goal of the tool or technology solution, your role in its development, how you worked with stakeholders, and whether your tool or technology solution was used as intended.

*** Required Question**