



## ASSISTANT GENERAL MANAGER, PERFORMANCE AND BUDGET

**JC:** XF213  
**PB:** 14  
**FLSA:** Exempt

**BU:** 95 (Non-Represented)  
**Created:** July 2001  
**Revised:** June 2019

*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, provides strategic leadership and direction in the execution of long-term and short-term goals of the budget and audit functions within BART; provides highly responsible and complex management and policy support to the General Manager; plans, directs, manages and oversees the activities and operations of the Office of Performance and Budget including Budgets, Financial Planning, Performance Management and Audit, and the Clipper program; coordinates assigned activities with other executive staff, departments and outside agencies; performs related duties as assigned.

### **CLASS CHARACTERISTICS**

This classification manages, through subordinate department managers, division managers and supervisors, all activities throughout the District related to the broad areas of operating and capital budgets, financial planning and analysis, performance management and audit, fare policy, and interagency agreements, and is accountable for accomplishing executive office goals and objectives, and for furthering District goals and objectives within general policy guidelines. This classification is distinguished from the General Manager in the latter, under policy direction of the Board of Directors, is responsible for the efficient operation of the District, which includes the implementation and coordination of all policies and the enforcement of all ordinances adopted by the Board of Directors through department heads, managers and employees.

### **REPORTS TO**

General Manager or designee.

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

1. Provides strategic leadership in the execution of long and short-term plans as they relate to operating and capital budgets, financial planning and analysis, performance management and audit, fare policy, and interagency agreements.
2. Oversees the development and implementation of executive office and assigned departmental goals, objectives, policies and priorities for each assigned service area.

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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 Performance and Budget; identifies opportunities for improvement; directs and implements changes; works with key staff to identify and resolve problems.
5. Assesses and monitors work load, administrative and support systems, and internal reporting relationships.
6. Communicates with internal and external customers to identify needs and resource problems; coordinates and allocates staff resources to meet these needs.
7. Participates in District-wide decision-making through collaboration with Executive Staff and other District groups and teams.
8. Provides strategic direction in policy, long and short-range financial planning, budgeting, financial analysis, business process and performance, and coordination of audits.
9. Monitors developments and legislation related to assigned areas of responsibility; evaluates impact upon District operations and policy; 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 and supports assigned departmental programs, policies and activities; negotiates and resolves sensitive and controversial issues.
13. Represents the Office of Performance 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. Staffs the Board of Director's standing Administration Committee; facilitates and oversees Board Action Review Committee in preparation for formal presentation to the Board of Directors.
16. Attends and participates in professional group meetings; stays abreast of new trends and innovations in the field of planning and financial management.

17. Responds to and resolves difficult and sensitive citizen and media 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 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 benefits program development and administration
- 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 performance 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:**

Bachelor's degree in Finance, Economics, Public Administration, Business Administration or a related field from an accredited college or university.

### **Experience:**

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Nine (9) years of (full-time) professional verifiable experience in financial planning, budget, policy development or related experience which must have included at least four (4) years of management 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.

**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.

**BART EEO-1 Job Group:** 0500 – Executives/Managers  
**Census Code:** 0020 – General and Operations Managers  
**Safety Sensitive:** No