



MANAGER OF FINANCIAL ANALYSIS AND ADMINISTRATION

JC: 000289

BU: 95 (NR)

PB: 9

Created: June 2019

FLSA: Exempt

*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 general direction, manages and oversees the operating budget program for the Maintenance and Engineering Division through financial analysis, report preparation, policy review and preparation; prepares budget recommendations and forecasting of funding for staff, equipment, materials and supplies; monitors and implements adjustment of expenditures; performs related duties as required.

CLASS CHARACTERISTICS

This is the full-scope managerial level classification, through subordinate professionals, manages complex and professional administrative duties in support the Departmental goals and objectives; reviews and evaluates programs or directly manages activities to provides substantive recommendations within area of financial analysis, budgeting and administration. This classification is distinguished from the Assistant Chief Maintenance Officer in that the latter is responsible for managing and overseeing the activities and operations of the division.

REPORTS TO:

Assistant Chief Maintenance Officer or designee.

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

1. Manages and oversees the operating budget program for the Maintenance and Engineering Division through financial analysis, report preparation, policy review and preparation; prepares budget recommendations and forecasting of funding for staff, equipment, materials and supplies; monitors and implements adjustment of expenditures.
2. Makes recommendations for action and assists in the development and implementation of policies, procedures, goals and objectives.
3. Conducts a variety of organizational, operational and analytical studies and investigations; recommends modifications to existing programs, policies and procedures as appropriate; prepares a variety of formal reports.
4. Selects, trains, motivates and evaluates assigned personnel; coordinates staff training; works

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with employees to correct deficiencies; implements discipline and termination procedures.

5. May direct, coordinate and review the work of staff and outside contractors; serves as liaison between departments and departments and/or executive offices to ensure program and project implementation.
6. Directs, coordinates and reviews the planning, development and implementation of contracts and administration of management procedures and internal control mechanisms; ensures the cost effective and efficient use of staff and resources in accomplishing goals and objectives.
7. Oversees and participates in the development and administration of annual operating budget; prepares and presents budget recommendations; participates in the forecast of funds needed for staffing, equipment, materials, and supplies; monitors and approves expenditures; implements adjustments.
8. Plans, prepares and coordinates the preparation of reports including recommendations to the Board of Directors, committees and other management staff.
9. Oversees labor issues and grievances; may prepare and handle grievance hearings and related matters; may direct negotiations with the Union on labor issues; may search for agreement and settlement on contractual disputes and complaints.
10. Attends and participates in professional group meetings; stays abreast of new trends and innovation in the field of accounting.
11. Serves as the liaison within the District and with outside agencies; provides solutions and methodologies for effective support to District operations; negotiates and resolves sensitive and controversial issues.
12. Explains, justifies and defends programs, policies and activities in assigned areas of responsibility.

QUALIFICATIONS

Knowledge of:

- Principles and practices of general, fund, and government accounting
- Principles and practices of project coordination and management
- Methods and techniques of policy analysis, research and development
- Methods and techniques of budget administration, statistical, financial, and management controls and analysis
- Principles of strategic planning
- Principles of business letter writing and report preparation
- Principles and procedures of filing and record keeping
- Principles of budget preparation and control
- Principles and practices of business math, accounting and budgeting
- Related Federal, State and local codes, laws and regulations

Skill/Ability in:

- Developing, implementing, interpreting and applying department policies, procedures, goals and

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objectives

- Exercising sound independent judgment within general policy guidelines
- Independently preparing correspondence and memoranda
- Planning, organizing and administering special projects and programs
- Planning, organizing and scheduling office priorities
- Researching, analyzing, compiling and summarizing a variety of materials
- Preparing and administering department budgets
- Operating office equipment including computers and supporting word processing and spreadsheet applications
- Preparing clear and concise administrative and financial reports
- Performing complex financial and statistical analysis
- Responding to requests and inquiries from the general public
- Understanding the organization and function of a public agency
- Interpreting and explaining District policies and procedures
- Analyzing problems, identifying alternative solutions and making recommendations
- Establishing and maintaining effective working relationships with those contacted in the course of work

MINIMUM QUALIFICATIONS

Education:

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

Experience:

Five (5) to seven (7) years of verifiable experience in financial analysis, budgeting or related experience.

Substitution:

Additional 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:

May require maintaining physical condition necessary for sitting for prolonged periods of time.

BART EEO-1 Job Group: 0500 – Executives/Managers
Census Code: 0100 – Administrative Services Manager
Safety Sensitive: No