



SENIOR MANAGER OF FINANCIAL ANALYSIS & ADMINISTRATION

JC: 000185

BU: 95 (NR)

PB: 10

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

Plans, directs, manages and oversees the activities and operations associated with all financial and administrative services within a department; coordinates assigned activities with other departments; provides highly responsible and complex administrative support to the assigned higher-level management staff; and performs related duties as assigned.

CLASS CHARACTERISTICS

This full-scope managerial level classification manages, through lower-level managers, supervisory and professional staff, financial and administrative services and activities within the assigned department, which may include financial planning, budgeting, reporting, and procurement support. This classification is accountable for accomplishing department objectives within general policy guidelines and is distinguished from other manager classifications in its specific overall management responsibility for administrative and financial support functions within an assigned department.

REPORTS TO

Assigned department or executive manager or designee

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

1. Assumes leadership and management responsibility for assigned services and activities associated with financial planning, budget development, analysis & reporting; procurement support; and departmental personnel support activities.
2. Manages and participates in the development and implementation of goals, objectives, policies, and priorities for assigned programs; recommends and administers policies and procedures.
3. Participates in the development and optimization of business management systems; provides data and supports the analysis to help inform management decisions and measure organizational performance.
4. Monitors and evaluates the efficiency and effectiveness of service delivery methods and procedures; recommends, within departmental policy, appropriate service and staffing levels.
5. Plans, directs, coordinates, and reviews the work plan for assigned staff; assigns work activities, projects, and programs; reviews and evaluates work products, methods and procedures; meets with staff to identify and resolve problems.

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6. Works closely with department leadership; cost center managers and outside subject matter experts to develop effective solutions and proper workflow processes and procedures.
7. Selects, trains, motivates, and evaluates personnel; provides or coordinates staff training; works with employees to correct deficiencies; implements discipline and termination procedures.
8. Leads in the development and tracking of annual capital and operating budgets; oversees development of tools for accurate forecasting of funds needed for staffing, equipment, materials, and supplies to support departmental goals and objectives.
9. Oversees the development and distribution of financial tracking and reporting tools.
10. Conducts a variety of organizational studies, investigations and operational studies; recommends modifications to policies and procedures as appropriate and coordinates with other departments to implement process improvements.
11. Attends and participates in professional group meetings; stays abreast of new trends and innovations in the field of financial forecasting and analysis tools and practices.

QUALIFICATIONS

Knowledge of:

- Principles and practices of budget forecasting, preparation, administration, analysis, and controls
- Principles and practices of financial systems management and business processes.
- Principles and practices of staff management
- Methods and practices of strategic planning, research, and analysis
- Professional office administration practices and procedures
- Related Federal, State, and local laws, codes, and regulations

Skill in:

- Financial planning & analysis
- Oversight of employee development programs
- Participating in the development and administration of division goals, objectives, and procedures
- Preparing and administering large program budgets
- Preparing clear and concise administrative and financial reports
- Analyzing problems, identifying alternative solutions, projecting consequences of proposed actions and implementing recommendations in support of goals
- Interpreting and applying 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

Possession of a bachelor's degree in Business Administration, or a closely related field, from an accredited college or university.

Experience

The equivalent of five (5) years of full-time professional verifiable experience in financial planning, employee development program oversight, or closely related experience, which must have included two (2) years of management level responsibilities.

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 walking, standing or sitting for prolonged periods of time.

BART EEO-1 Job Group: 0500 – Executives/Managers
Census Code: 0120 – Financial Managers
Safety Sensitive: No

CLASSIFICATION HISTORY

Created : December 2018
Revised : October 2021
June 2023