

May 23, 2022

**TITLE:** Budget Analyst III (2 vacancies)  
**EMPLOYMENT TYPE:** Exempt (Full Time)  
**DIVISION:** Finance (Budgets)  
**PAY RANGE:** \$1,913.67 - \$2,870.51 weekly (\$99,511 - \$149,267 estimated annual)  
**APPLICATION DEADLINE:** **Continuous Recruitment (Open until filled)**  
**WORK LOCATION:** San Carlos, CA  
**WORK SCHEDULE:** Hybrid Work Schedule

**GENERAL DESCRIPTION:**

The Budget Analyst III is a senior level Budget Analyst position that will report to the Manager, Budgets and is responsible for analyzing and preparing the operating and capital budgets for three agencies: the San Mateo County Transit District (SamTrans), the Peninsula Corridor Joint Powers Board (Caltrain), San Mateo County Express Lanes Joint Powers Authority (ELJPA), and the San Mateo County Transportation Authority (TA).

**EXAMPLES OF ESSENTIAL FUNCTIONS:**

- Receive, review, and monitor cost center manager budget requests for SamTrans, Caltrain, ELJPA TA operating and capital programs.
- Prepare the budget report in the monthly financial statement and staff reports for Board approval.
- Review and verify budget authority for both operating and capital projects for up to four agencies, including monthly and quarterly staff reports.
- Review and analyze year-over-year budget changes, historical and future trends, and project budget assumptions.
- Liaison with internal staff and external stakeholders to provide and/or retrieve budget information.
- Assist with development and analysis of the annual operating and capital budget; development of baseline budgets, and processing new budget requests for approval by executive team.
- Supervise staff. Hire, mentor and take appropriate corrective and/or disciplinary action. Ensure EEO policies and procedures are followed. Participate in selection of staff. Coordinate staff training and professional development. Establish performance objectives. Monitor and evaluate employee performance.

**EXAMPLES OF DUTIES:**

- Analyze and process the activation of funds for capital projects.
- Monitor the implementation of the funding plan for capital projects.
- Provide operating and capital analysis for current budget year activities.
- Process budget transfer requests.
- Prepare the monthly financial statement presented to the Board of Directors.
- Prepare the annual budget book based on the Government Finance Officer Associations' (GFOA) standards and best practices.
- Prepare budget presentations for Citizen's Advisory Committees and Board of Directors approval.
- Prepare funding application to Metropolitan Transportation Commission (MTC) for State Transit Assistance and Transportation Development Act funds.
- Conduct training for Cost Center Managers for budget process as needed.

- Perform all job duties and responsibilities in a safe manner to protect one's self, fellow employees and the public from injury or harm. Promote safety awareness and follow safety procedures in an effort to reduce or eliminate accidents.
- Perform other duties as assigned.

**SUPERVISION:** Works under the general supervision of the Manager, Budgets who establishes goals and objectives and evaluates performance.

**MINIMUM QUALIFICATIONS:**

Sufficient education, training and experience to demonstrate the knowledge and ability to successfully perform the essential functions of the position. Development of the required knowledge and abilities is typically obtained through but not limited to:

- A Bachelor's Degree in accounting, finance, or related field.
- Three (3) years full-time increasingly responsible experience in budgeting, forecasting, financial analysis, or related field.

**PREFERRED QUALIFICATIONS:**

- Experience with grant budgeting is desirable.
- Experience with enterprise financial management system (e.g. PeopleSoft) is desirable.
- Experience with Government Finance Officer Association (GFOA) reporting is desirable.
- Effective written and oral communication skills.
- Effective research and analytical skills.
- Proficiency in Microsoft Office Suite programs.

**SELECTION PROCESS MAY INCLUDE:**

The selection process may consist of an evaluation of the applicant's qualifications, panel interview, and/or internal Department interviews. Upon completion of the selection process, an offer of employment may be conditionally based upon the successful completion of employment and education verification and criminal background check.

**BENEFITS:**

For additional information on SamTrans benefits, please visit, <https://www.smctd.com/jobs.html#benefits>

Holidays : Seven paid holidays, plus up to four floating holidays per year

Paid Time Off : Up to 26 days (PTO) per year

Cafeteria Plans : Medical, dental, vision care, group life insurance and more

Transportation : Free Bus Transportation for employees and qualified dependents

Pension : Social Security and California Public Employees Retirement Systems (CalPERS)

- Classic Members – 2% @ 60 benefit formula, 3 year average of highest compensation
- New Members – 2% @ 62 benefit formula, 3 year average of highest compensation

**HOW TO APPLY:**

- To apply, please visit the [www.samtrans.com/about-samtrans/jobs](http://www.samtrans.com/about-samtrans/jobs). This is a continuous recruitment until filled. Complete an online employment application. A resume will not be accepted in lieu of the application. Incomplete applications will not be considered.
- The Human Resources Department will make reasonable efforts in the recruitment/examination process to accommodate applicants with disabilities upon request. If you have a need for an accommodation, please contact the Human Resources Department at (650) 508-6308 or email written request to [hr@samtrans.com](mailto:hr@samtrans.com).
- SamTrans celebrates diversity and is committed to creating an inclusive and welcoming workplace environment. We are an Affirmative Action/Equal Opportunity Employer. Minorities, Women, Persons with Disabilities and Veterans are encouraged to apply.