

# JOB OPENING ANNOUNCEMENT

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Employment Hotline 650-508-6308

May 5, 2023

**TITLE:** Senior Financial Analyst  
**EMPLOYMENT TYPE:** Exempt (Full Time)  
**DIVISION:** Financial Planning & Analysis  
**PAY RANGE:** \$1,913.67 - \$2,870.51 weekly (\$99,511 - \$149,267 estimated annual)  
**APPLICATION DEADLINE:** **Sunday, May 28, 2023**  
**WORK LOCATION:** San Carlos, CA

**JOB SUMMARY:** The Senior Financial Analyst reports to the Manager, Financial Planning & Analysis and will collaborate with finance and business leaders to perform high-impact analysis, deliver recommendations on critical decisions, and manage long-term financial projections. The role will design, analyze, and implement management reports to turn analysis into action. This position is also responsible for creating financial and decision making models, as well as undertaking ad hoc assignments and projects as required.

## **EXAMPLES OF ESSENTIAL FUNCTIONS:**

- Perform complex financial analysis, using statistical and accounting techniques to evaluate options and alternatives using cost-benefit and quantitative analysis.
- Develop and/or assist in the creation or improvement of various forecasting models. Perform scenario analysis given various financial and operational inputs.
- Prepare variance reporting to gain insight on performance to budget.
- Research historical data and benchmarking to prepare reports.
- Develop revenue and ridership forecasts and economic analyses.
- Assist in developing models to analyze trends and make recommendations to managers for strategy and change action.
- Prepare executive-level strategic monthly financial reporting to various public transit programs with executive summary, highlights, and insights on financial and operating outlook and performance.

## **EXAMPLES OF DUTIES:**

- Lead financial forecasting, long-term financial projections, and month end close, to enable effective decision support and strategic financial reporting for executives.
- Manage FP&A processes involving forecasting revenue, expenditures, and headcount planning in partnership with cross-functional teams; collaborate with Accounting and other Finance Teams to manage expense and revenue.
- Consult with staff at all organization levels, representatives from organizations and groups, and the general public to give and/or secure necessary information.
- Provide analysis and support on special projects and ad hoc assignments as required.
- Compile financial forecasting models for operating and capital programs.
- 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, Financial Planning and Analysis who establishes goals and objectives and evaluates performance

**MINIMUM QUALIFICATIONS:** Sufficient experience, training and/or education to demonstrate the knowledge and ability to successfully perform the essential functions of the position. In lieu of a degree, work-related experience that demonstrates the skills and experience necessary to perform this role will be accepted. Development of the required knowledge and abilities is typically obtained through but not limited to:

- Bachelor's degree in Business Administration, Economics Finance, Accounting or closely related field.
- Three (3) years of full-time experience relevant experience in performing financial analysis, financial forecasting/budgeting/planning, and operation/business analysis.

**PREFERRED QUALIFICATIONS:**

- Experience and knowledge in Business Intelligence Systems (e.g. Tableau, Power BI, TM1, Hyperion, etc.)
- Experience/knowledge in public transportation field is desired.
- Working knowledge in Accounting/ERP systems (e.g. PeopleSoft).
- Proficient in advanced Microsoft Excel, PowerPoint, including advanced functions such as graphics, pivot tables, etc.
- Excellent verbal and written communication skills.
- Detail-oriented/highly organized with deep experience in deriving insights from data analysis with concise story lines and presenting to management and influence decision making.
- Strong financial acumen and understanding key business drivers. End-to-end quantitative thinking. Strong leadership, interpersonal, and presentation skills.

**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. Meeting the minimum qualifications does not guarantee an invitation to continue in the process.

**BENEFITS:**

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

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

Work Location : Select positions are eligible to work remote up to 50% of the time

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/jobs](http://www.samtrans.com/jobs). Complete an online employment application by 11:59 pm on **Sunday, May 28, 2023**. 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 [recruitment@samtrans.com](mailto:recruitment@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.