

September 22, 2023

TITLE: Budget Analyst III
EMPLOYMENT TYPE: Exempt (Full-Time)
DIVISION: Finance (Budgets)
APPLICATION DEADLINE: Sunday, October 29, 2023 (1st cutoff October 15, 2023)
PAY RANGE: \$1,913.67 - \$2,870.51 weekly (\$99,511 - \$149,267 estimated annual)
WORK LOCATION: San Carlos, CA

JOB SUMMARY:

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: 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.
- Collaborate with internal stakeholder to ensure grant funding is allocated to the appropriate projects.
- Preparation of the Indirect Cost Allocation (ICAP) calculation in accordance with Office of Management and Budget (OMB) Circular A-87 and ASMB C-10.
- Preparation and filing of Indirect Cost Allocation Plan/Indirect Cost Rate Proposal (ICAP/ICRP) application with FTA and Caltrans.

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.
- Identify, prioritize, and propose solutions to budget issues.
- Perform budget monitoring activities including revenue and expense forecasting, and budget to actual cost comparison for monthly, quarterly and annual financial reports.
- Assist with the ICAP calculation by providing supporting workbook and documentation.
- 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 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 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:

- 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.
- Public Sector experience, ideally transportation related.
- Experience with enterprise financial management system (e.g. PeopleSoft).
- Experience with Government Finance Officer Association (GFOA) reporting.
- Effective written and oral communication skills in one-to-one and one-to-many settings.
- Effective research and analytical skills.
- Proficiency in Microsoft Office Suite programs, specifically Excel and PowerPoint.

SELECTION PROCESS MAY INCLUDE:

The process will include a panel interview, technical skills tests and assessments, as well as supplemental questions. Only those candidates who are the most qualified will continue in the selection process. Meeting the minimum qualifications does not guarantee an invitation to continue in the process.

CURRENT EMPLOYMENT BENEFITS AT SAMTRANS:

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

Holidays:	Seven (7) paid holidays, plus up to four (4) floating holidays per year.
Paid Time Off:	Up to 26 days 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) <ul style="list-style-type: none"> • 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 <https://www.samtrans.com/jobs>. Complete an online employment application by 11:59 p.m. on Sunday, October 29, 2023 (1st cutoff October 15, 2023). A resume will not be accepted in lieu of the application. Incomplete applications will not be considered.

San Mateo County Transit District, 1250 San Carlos Ave., San Carlos, CA 94070-1306

- 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.
- 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.