



STRATEGIC BUDGET ADMINISTRATOR

JC: 000223
PB: AFH
FLSA: Exempt

BU: 31 (AFSCME)
Created: July 2019

*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, plans and administers BART's strategic budget process to facilitate decision making for annual budget requests based on stated District priorities; coordinates the activities of the BART strategic budget process, which integrates the BART Strategic Plan (BSP) with the annual budget using asset management principles for risk-based decision making; serves as the Performance & Budget liaison to the Strategic Asset Management program; and performs related duties as assigned.

CLASS CHARACTERISTICS

This classification is an administrator responsible for providing exceptional expertise in a specialized program area that is critical to the mission of the organization and manages that program area. Classifications in this category typically represent the organization, are subject matter experts possessing highly specialized knowledge, skills, abilities, and experience, and are responsible for a specialty program area that has a major impact on the organization. Incumbents in this classification are responsible for providing leadership to drive, complete, and enrich the annual strategic budget process, accountable for aligning BART's strategic goals and strategies with budget requests from a wide variety of stakeholders and leading executive staff to prioritize budget allocations based on these priorities and lead and participate in activities that enable more effective agency decision making. This classification may also support the development of an enterprise risk management program to apply risk-based decision making to the budget process. This classification differs from the Principal Financial Analyst in the latter is responsible for performing the most technical and complex tasks relative to assigned area of responsibility and ensures work quality and adherence to established policies and procedures.

REPORTS TO:

Assistant General Manager, Performance & Budget or designee.

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

1. Leads integration related to the BART Strategic Plan (BSP) with the annual budget process, including developing and executing an integration plan with short and long-term measurable deliverables; oversees and coordinates joint involvement of the Budget, Financial Planning, Strategic Planning, Asset Management Departments to align resource needs and budget requests

to the agency's stated strategic goals and objectives; leads all Departments in collection of budget requests.

2. Administers the strategic budget process that integrates the BSP with the annual budget including monitoring performance related to the departmental four-year work plans and strategic budget initiatives; serves as Performance and Budget liaison to the Strategic Asset Management program; engages all departments to provide annual budget requests; facilitates presentation of and tracks strategic budget options and decisions, including in preparation for and during annual Strategic Budget Hearings with the General Manager; monitors and tracks resource needs, budget initiatives, and supports ongoing efforts to implement risk-based decision making.
3. Proactively develops, gathers, evaluates, and documents all strategic budget process requirements; leads adjustments to the overall strategic budget process framework based on feedback from stakeholders; fosters real-time business delivery of data to make informed decisions; facilitates discussion with senior leadership to prioritize budget requests, considers tradeoffs and tracks budget requests for long term projects to ensure appropriate long-term investment.
4. Administers the District's performance and spending of prior year budget investments to inform subsequent budget discussions; including working with Budget and Department staff to set up project codes, tracking, time codes, tracking.
5. Develops regular/quarterly status reports on the progress of the Strategic Budget Process to support District-wide engagement; stays abreast of dependencies that can risk timely decision making for budget requests and adjusts framework as necessary.
6. Coordinates and/or contributes to production of various Board and public-facing reports, including the Annual Report, Preliminary Budget Resource Manual, Adopted Budget Document, Short-Range Transit Plan/Capital Improvement Program, and other related documents.
7. Assists Strategic Planning, Budget, Asset Management, Performance, Executives, and other stakeholders with development, updates, and implementation of the BSP; works closely with Strategic Planning, Asset Management, Performance, and Budget to map the annual, long- and mid-term needs to the BSP, and capture needs in a comprehensive, easily readable/sortable matrix for Executive assessment, prioritization, and decision-making.
8. Collaborates with Asset Management, Performance, and Departments to build a transparent and accessible framework for annual and long-term budget decision-making, including but not limited to structuring a comprehensive District-wide tool to compare risk, funding, cost of investment against cost of failure, maintenance, deferral, and other options/impacts; promotes the tool to facilitate data-driven decision making, prioritization, funding, and performance measurement; works with Departments and Performance to determine appropriate key performance indicators and performance delivery plans associated with funding requests and allocations.
9. Partners with Departments, Budget, and Performance to periodically assess existing baseline budgets; test reasonableness of existing performance and delivery expectations, specifically if expectations are within budget; recommends reappropriations and/or realignment as necessary.

10. Effective at relationship building, consensus building, needs assessment, operational assessment, and proactively engaging with diverse stakeholders with divergent needs.
11. Skilled in understanding, capturing, and translating technical and operational need into clear, concise, and comparable summary documents for diverse and high-level audiences.
12. Attends, participates, and leads professional group meetings and a variety of committees; stays abreast of new trends and innovations in the field; prepares and presents staff reports and other correspondence as appropriate and necessary.
13. Provides or coordinates staff training; trains assigned employees in assigned areas of work including methods, procedures and techniques.
14. Ensures work quality and adherence to established policies and procedures; supports team morale and a positive work environment.
15. Participates in special projects as assigned.

QUALIFICATIONS

Knowledge of:

- Principles and practices of budget preparation and administration.
- Methods and techniques of enterprise risk management/ISO 31000.
- Risk-based decision making, especially pertaining to public sector budgeting.
- Methods and techniques of enterprise strategic asset management/ISO 55001.
- Principles and practices of strategic planning.
- Operations of a comprehensive budget and financial analysis program.
- Methods and techniques of management analysis.
- Methods and techniques of forecasting.
- Principles and practices of project management.
- Budgeting, financial management and accounting information systems and technology.
- Current office procedures, methods, equipment, and applications.
- Principles of business letter writing and financial report preparation.

Skill in:

- Managing a comprehensive budget and financial analysis program.
- Assessing departmental goals, objectives and procedures.
- Analyzing and assessing policies and operational needs.
- Translating stated or implied needs into researchable management analyses and initiatives.
- Identifying and responding to sensitive organizational issues, concerns and needs.
- Delegating authority and responsibility.
- Researching, analyzing and evaluating new service delivery methods and techniques.
- Managing statistical and financial analysis of budgets.
- Managing studies of financial and budgetary performance.
- Preparing clear and concise administrative and financial reports.
- Assisting in preparing and administering large and complex budgets.
- Interpreting and applying applicable Federal, State and local policies, laws and regulations.

Strategic Budget Administrator

Page 4

- 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:

A Bachelor's degree in business administration, public administration, accounting, finance, statistics, data analytics or a closely related field from an accredited college or university.

Experience:

Four (4) years of (full-time equivalent) verifiable professional experience in budget, operational, or financial performance management or project management experience.

Substitution:

Additional professional experience as outlined above may be substituted for the education on a year-for-year basis. A Bachelor's 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: 3500 – Professionals
Census Code: 0820 – Budget Analysts
Safety Sensitive: No