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accounting, payroll, and controllership; the Controller also sees all cash handling, the Treasury which over responsibilities include: the General Manager, General Counsel, Controller-Treasurer, District Secretary, and the Independent Police Auditor. The Controller-Treasurer position include, but are not necessarily limited to, the following: accounting, tax accounting, and internal auditing. A Certified Public Accountant (CPA), Certified Management Accountant (CMA), or Chartered Financial Analyst (CFA) and/or Master’s degree in Business Administration, Finance, Public Administration or a related field is desirable. Also desirable is experience in a large and diverse public organization with increasingly responsible organizational responsibilities.

THE COMPENSATION
The current annual salary for the retiring Controller-Treasurer is $224,736. The compensation and benefits of the selected candidate is subject to negotiation between the candidate and the Board of Directors.

ORGANIZATIONAL DESIGN & GOVERNANCE
The BART Board of Directors consists of nine members, each elected to a four-year term from one of nine election districts within the counties of Alameda, Contra Costa and San Francisco that comprise the communities that contribute to the BART budget. The Board of Directors directly appoints the following positions: the General Manager, General Counsel, Controller-Treasurer, District Secretary, and the Independent Police Auditor. The Controller-Treasurer reports directly to, and serves at the pleasure of, the Board of Directors.

THE POSITION
Under policy direction from the Board of Directors, the Controller-Treasurer plans, organizes, directs, and administers the functions of the Finance Department, including Financial Accounting, Treasury Services, Risk Management, Payroll, and related activities and provides advice and financial information to District staff and the Board of Directors regarding District financial activities. This position functions as the Chief Financial Officer for the District and is responsible for the management and oversight of finance, disbursement, investment, debt administration, cash collection and revenue services, controllership, payroll, and risk management.

THE IDEAL CANDIDATE
BART is seeking an experienced professional who is willing to exercise independent judgment and initiative while always keeping the best interests of the District as a priority. Experience in pension obligations and the ability to manage debt and bonds, as well as having experience in re-financing debt are highly desirable. The successful candidate must be a skilled finance manager, a creative problem-solver, adept at utilizing technology effectively, and bring a demonstrated customer service orientation. It will be important in this role to value input from a variety of sources and ensure that all stakeholders feel respected and heard but make firm independent recommendations to the Board.

The ideal candidate should demonstrate the ability to build and maintain positive working relationships with District staff, the Board of Directors, members of the public, and members of the financial community. It is also essential that this executive manager has experience supervising, coaching and developing staff. This position attends every meeting of the Board of Directors and may be called upon to offer professional advice within their scope of duties. The Controller-Treasurer may present technical and administrative reports and studies; therefore, it will be necessary for the successful candidate to effectively communicate complex financial information to a wide variety of stakeholders in a transparent manner.

Candidates must possess a Bachelor’s degree from an accredited college or university with major coursework in finance, business administration, economics, accounting, public administration, or a closely related field. Pursuant to 28810 of the California Public Utilities Code, “the person appointed Controller shall have been actively engaged in the practice of accounting for not less than seven (7) years next preceding appointment.” At least two (2) of the seven years of experience must include direct supervision duties. Accounting practice relates to the practical application of accounting to the financial accumulation and reporting needs of an organization. Examples of qualifying accounting experience can include, but are not necessarily limited to, the following: financial accounting, public accounting, forensic accounting, management accounting, tax accounting, and internal auditing.
The mission of the San Francisco Bay Area Rapid Transit (BART) District is to provide safe, clean, reliable, and customer-friendly regional public transit service in order to increase mobility and accessibility, strengthen community and economic prosperity, and preserve the environment in the Bay Area. BART is widely regarded as successfully doing just that, by those in the Bay Area and nationally, and by those in the public transit industry. This is one of America’s premier heavy rail systems. BART began construction of the Trans-Bay Tunnel and the core system in 1964 and initiated revenue service in 1972. With continual line extensions since, it now serves a population area of over 5 million people. BART transports approximately 430,000 passengers each weekday among its 45 stations in the region, making 104 million passenger trips a year. BART has approximately 3,700 employees, an annual operations budget of $900.4 million, a capital budget of $664.8 million, and a current outstanding debt of approximately $1.4 billion with an additional General Obligation bond capacity of approximately $480 million based on financial statements.

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THE DEPARTMENT

The office has 109 employees and primary responsibilities include: the Treasury which oversees all cash handling, revenue control, and credit/debit fare programs; the Controller oversees all aspects of accounting, payroll, and financial reporting; and Risk Management, administering the risk and liability insurance program for the entire District.

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Essential functions of the Controller-Treasurer position include, but are not limited to: reviewing, modifying, and approving Finance Department goals and objectives; developing and implementing strategies and policies pertaining to review, adjustment, and implementation of short and long term financial plans; developing new sources of funding and overseeing the utilization of funding sources; formulating, developing, and implementing policies and procedures that maintain and improve BART’s financial position, including financial planning, capital budget expenditures, and statistical information collection and analysis; establishing and maintaining effective relationships with local, state, and Federal agencies, investment bankers, credit analysts, commercial bankers, and other members of the financial community; and formulating, recommending, and administering the District’s Investment and Risk Management policies.

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