

<b>Job Title:</b>	Capital Portfolio Analyst	<b>Job Level:</b>	Employee
<b>Division/Department:</b>	Capital Planning, Funding and Analysis	<b>Job Band:</b>	Exempt 2
<b>Supervisor Title:</b>	Manager, Capital Portfolio	<b>Supervisor Job #:</b>	1678

### **ORGANIZATIONAL DESCRIPTION**

BC Transit is a provincial crown corporation responsible for the overall planning and delivery for all of the different municipal transportation systems within British Columbia, outside Greater Vancouver.

### **JOB OVERVIEW**

BC Transit's Capital Portfolio includes a 10-year portfolio of active and future (planned) capital and major operating projects. The Capital department is part of BC Transit's Finance division and is responsible for administering the capital project portfolio as a whole. The department performs portfolio-level planning, funding and governance (including managing agreements, eligibility, project approval forms, etc.), forecasting/reporting, funding partner invoicing, asset management accounting, and other administration.

The Capital Portfolio Analyst supports portfolio level planning, forecasting, monitoring, and financial control. They support capital planning activities and the development of governance forms and approvals required at various stages of the project lifecycle, and they work closely with project teams to monitor project performance. They also maintain financial and non-financial project information in the financial system and MS Excel, and assist with portfolio-level reporting. The Analyst works under the day-to-day direction and delegation of Senior Analysts within the department.

### **ACCOUNTABILITIES**

- Assists with the maintenance of financial and non-financial capital project and portfolio-level information in the financial system (JD Edwards) and the capital portfolio data repository (MS Excel).
- Supports the preparation of project governance documents, including business cases, change requests, and closeout reports. Ensures compliance with the project governance framework, other internal policies and procedures, and funding agreements.
- Provides management control to ensure progress at the project and portfolio level is regularly monitored. Maintains baselined budgets and key milestone dates. Responsible for the collection and review of internal project progress updates, and the associated

identification of action items required for compliance with internal policy and external capital funding agreements.

- Supports the preparation of internal and external portfolio-level reporting.
- Supports the preparation of the long-term capital plan.
- Identifies weaknesses or gaps in existing processes or tools and templates, and proactively implements improvements to reduce risk or create efficiencies.
- Creates and maintains department process documentation and standards, including associated tools, templates and guidelines.
- Assists capital project teams with understanding and following the capital processes within BC Transit, troubleshooting and resolving problems as required.

## **QUALIFICATIONS**

### **EDUCATION**

- Post secondary degree in business, finance or a related discipline.

### **EXPERIENCE**

- A minimum three (3) years related experience. An equivalent combination of education, training and experience may be considered.
- Advanced proficiency level in Excel to use customized spreadsheets to meet internal and external reporting and billing requirements. Experience with pivot tables is an asset.
- Strong reconciliation and analytical skills, and knowledge of data collection and analysis methodologies.
- Experience with computerized financial systems in a mid-to-large sized organization.
- Strong communication skills (written and verbal).