



# THE STATE BAR OF CALIFORNIA

OFFICE OF HUMAN RESOURCES

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## **PRINCIPAL ANALYST, OFFICE OF RESEARCH AND INSTITUTIONAL ACCOUNTABILITY**

Office: Executive  
Status: Exempt – Executive  
Grade: 55E

### **ORGANIZATIONAL RELATIONSHIPS**

Reports to: Director, Office of Research and Institutional Accountability or other Executive  
Staff assigned  
Supervises: Staff as assigned

### **DEFINITION**

The Office of Research and Institutional Accountability (ORIA) is responsible for ensuring excellence, efficiency, accountability and compliance in State Bar operations, as well as serving as the Bar's primary source for research and data analysis. The Principal Analyst (PA) serves under the general oversight of the Director, ORIA, and is responsible for designing and implementing organizational data collection, research and analysis, fiscal audits, and program evaluation related to the internal performance of the Bar as well as implementation of special projects as assigned. This position serves on a team that is responsible for continuous organizational improvement, collaboration, accountability and professionalism through the use of data, statistical, financial, and program analysis. This position will plan and execute projects according to strict deadlines and within budget. This includes leading and coordinating the efforts of inter-divisional teams to ensure delivery of projects according to plan and overseeing quality control throughout the projects' life cycle. The PA may also oversee other functions as assigned.

(For Case Management System position only) The initial assignment for this position will be serving as the Project Manager for the implementation of new Case Management Systems throughout the organization. As such, a desired qualification for this position is experience in case management system configuration and deployment.

### **MAJOR DUTIES & RESPONSIBILITIES**

1. The PA is responsible for developing a data collection, research and evaluation plans, and for the execution of those plans from beginning to end for all major program areas of the State Bar, to include fiscal and operational analyses, development and presentation of data dashboards, and outcome evaluation. The PA will work with internal customers to understand the results of analyses that are conducted, and to operationalize changes in practice or procedure that are implicated by those results.
2. The PA is responsible for extracting and analyzing data from the State Bar's information systems, implementing research strategies, and writing reports in support of institutional

performance analysis and program evaluation. The PA is responsible for conducting internal performance and financial audits pursuant to a performance and financial audit plan, to ensure that the State Bar's core functions are being performed efficiently and effectively, in compliance with all governing mandates. Where appropriate and feasible, the PA is also responsible for working with stakeholders to correct issues identified in the course of the audits.

3. The PA is responsible for overseeing the implementation of special projects, particularly those crossing multiple units or Departments within the Bar, to include, in the near term, Workforce Planning and Compensation Studies, workforce composition and distribution changes resulting from those studies, institutional records management, and case management system initiatives. The PA may serve as staff for Board of Trustee committees or Executive Office efforts, to include, in the near term, the Governance in the Public Interest Taskforce.
4. The PA responds to internal and external inquiries about the State Bar's data collection and analysis, continuous improvement, and internal audit efforts.
5. In collaboration with the Office of Communications and Stakeholder Engagement, the PA drafts responses in support of the Bar's communication strategy. The PA responds to related inquiries from Executive Staff, Board Members, the Judiciary, the Legislature, the Governor's Office, and other stakeholders.
6. The PA may be responsible for leading subordinate staff including a mix of administrative support, analytical, and technical staff, in a manner that is consistent with governing labor agreements and State Bar policy. In addition, the PA is responsible for directing the work of contractors and consultants, in accordance with State Bar policies.
7. The PA assumes other related duties and responsibilities as assigned.

## **KNOWLEDGE & SKILLS**

1. Principles of program evaluation, policy assessment and implementation
2. Principles of project administration, development and management.
3. Principles of problem identification, analysis and resolution
4. Principles of project research and analysis.
5. Principles of business process reengineering.
6. Principles of institutional management.
7. Principles of effective written and verbal presentations, including public speaking.
8. Principles of effective communication.
9. Principles of public relations/customer service.
10. Principles of board and committee administration.
11. Principles of organizational behavior and conflict resolution.
12. Principles of financial and public policy analysis and research.
13. Principles of effective institutional communication in dealing with different constituencies.
14. Principles of effective personnel management in a union environment.
15. Principles of government relations.

## **ESSENTIAL ELEMENTS / ABILITY TO**

*PRINCIPAL ANALYST, OFFICE OF RESEARCH AND INSTITUTIONAL ACCOUNTABILITY*

1. Create a detailed work plan which identifies and sequences the activities needed to successfully complete the project.
2. Develop a schedule for project completion that effectively allocates the resources needed.
3. Conform to shifting priorities, demands and timelines through analytical and problem-solving capabilities.
4. Receive and relay detailed information through verbal and written communication.
5. Communicate clearly and effectively in person, by telephone, by computer and in writing.
6. Travel by air and automobile.
7. Review and analyze complex written documents.
8. Speak publicly to large groups of people.
9. Perform under stress and adopt effective courses of action.
10. Effectively interact with others.
11. Effectively address conflict.
12. Retrieve, lift and carry files and documents weighing up to ten (10) pounds with reasonable accommodation.

**MINIMUM QUALIFICATIONS**

1. Minimum five (5) years progressively responsible experience in business process reengineering, data collection and evaluation, research or performance or financial auditing in a public sector, legal or nonprofit environment, or equivalent;
2. Minimum two (2) years of lead experience with personnel and budget responsibilities;
3. Bachelor's Degree in relevant field such as public administration, business administration, public policy, or social science, may substitute for up to two (2) years of experience;
4. Master's Degree in relevant field may substitute for up to three (3) years of experience;
5. Project Management Professional (PMP) certification desired, but not required.
6. Experience working with database-driven management reporting systems and / or data management software such as SAS, Stata, Python, or SPSS desired but not required.

*Revised August 2016*