



PRINCIPAL PERFORMANCE ANALYST

JC: 000201
PB: G
FLSA: Exempt

BU: 31 (AFSCME)
Created: May 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 supervision, performs the most technical and complex analytical tasks of maturity and performance assessments, performance management programs including performance metrics development and monitoring, and performance analyses; leads the design, implementation and administration of large process or system transformation programs to enable continuous improvement across District departments; works with management and assigned staff to lead the development of standards, internal controls, goals and objectives for assessments and performance improvement activities; performs related duties as assigned.

CLASS CHARACTERISTICS

This is the highest level within the Performance Analyst series. Positions at this master level perform the most technical and complex duties assigned to the series. This classification may also be responsible for overseeing the work of contract staff or assisting higher-level managerial staff in planning and evaluating the quantity and quality of work performance by subordinate staff. This position is distinguished from the Senior Manager of Performance and Innovation in that the latter is responsible for managing and overseeing the District's performance and innovation function to establish processes that enable departments to effectively measure organizational performance and provide actionable insights that allow for the continuous improvement of business performance throughout the District.

REPORTS TO:

Senior Manager of Performance and Innovation or his/her designee.

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

1. Leads the design, development, evaluation and implementation of performance analyses, maturity assessments, and process improvements including defining scope, goals and objectives, developing project plans and timelines, and interpreting analytical findings.
2. Leads improvement initiatives including transformation projects; conducts training and advisory services; develops training curricula for continuous improvement, including lean processes; documents and summarizes lessons learned from transformation projects and initiatives; develops and manages knowledge base of continuous improvement tools suitable for the District.

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3. Leads the development of project management approach for large system transformation or process improvement initiatives; defines scope, goals and objectives, develops project plans, timelines and other monitoring tools to ensure completion of project deliverables; utilizes change management tools to engage and facilitate buy-in from project stakeholders; determines, allocates and monitors project resources; develops status reports and regularly reviews project status with management.
4. Provides support to the Senior Manager of Performance & Innovation and advises District management on the compliance, effectiveness, and economy of District activities.
5. Participates in and leads the collection of data, including assisting with designing surveys and questionnaires, developing sample methodologies and overseeing resulting data collection; assists in the identification of data sources, collection, and validation of data.
6. Coordinates assigned program activities with those of other departments, divisions and outside agencies and organizations; establishes partnerships with internal and external stakeholders and peers to ensure results are achieved.
7. Prepares and reviews analytical and statistical reports tailored for various levels of District management; assists in systematizing/institutionalizing District-wide performance management analytics.
8. Participates in and leads program and process evaluations based on outcomes of risk management, strategic planning, budgeting or other Districtwide initiatives; translates stated or implied District needs into researchable management analyses and initiatives.
9. Participates in the preparation and administration of the department or division program budget; submits budget recommendations; monitors expenditures.
10. Develops functional relationships with other departments, as assigned, to facilitate activities involving the departments; provides requested consulting services as requested on a broad range of issues.
11. Leads assigned employees in their areas of work including methods, procedures and techniques.
12. Assists with and leads monitoring, administering, and negotiating consultant contracts, coordinates consultant work with other departments, and serves as liaison for analyses and projects.
13. Develops standard operating procedures and policies; monitors and supports transition from project phase to regular operations; conducts follow-up assessments as needed.
14. Attends, leads, and participates in 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.
15. May participate in the selection and training of assigned staff.

16. Participates in special projects as assigned.

QUALIFICATIONS

Knowledge of:

- Continuous improvement, including practices and concepts of process management systems and Lean methodology.
- Methods and techniques of change management, strategic planning, enterprise risk management and transit strategic asset management; translation of stated or implied needs into researchable management analyses and initiatives.
- Principles of performance management, analysis, assessments, and improvement.
- Principles and practices of policy analysis, development and administration.
- Principles and practices of business systems applications and operational analysis.
- Methods and techniques of advanced data analysis, investigative and quantitative analysis, and quantitative methods such as statistical sampling and regression analysis.
- Funding policies of various government entities and commissions.
- Principles of lead supervision and training.
- Business and audit ethics.
- Current office procedures, methods, equipment, and applications.
- Principles of business letter writing and financial report preparation.

Skill in:

- Recommending and leading the implementation of goals and objectives for performance management, transformation initiatives, and continuous improvement programs.
- Leading and supporting transformation initiatives, utilizing Lean process improvements and change management concepts.
- Leading performance or program evaluations and maturity assessments.
- Developing performance measures and Key Performance Indicators (KPIs), determining performance targets, evaluating results, and conducting benchmarking and comparative studies of progressive and innovative organizations.
- Data analytics; familiarity with designing and maintaining data associated with the delivery of regular reports and visualizations, including the design, maintenance, and updates to dashboards and other forms of communication.
- Ability to organize, combine, and tabulate large amounts of data into clear reports, charts, and dashboards that are understandable to stakeholders.
- Supervising analytical and technical staff; managing vendors, contractors and other parties.
- Supervising, organizing and reviewing the work of lower level staff.
- Selecting, supervising, training and evaluating subordinate co-workers.
- Partnering and collaborating with a broad range of peers and stakeholders for joint initiatives, coordinating participation and buy-in. Planning, supervising and designing research and evaluation projects.
- Applying practices and theories, techniques and management methodologies to assigned projects.
- Coordinating and administering budget processes for assigned departments or divisions.
- Researching, analyzing and evaluating programs, policies and procedures.
- Interpreting, explaining and enforcing division/department policies and procedures.
- Performing complex statistical, financial and other mathematical analyses.

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- Operating office equipment and supporting software, including word processing and spreadsheet applications.
- Understanding the environment, demands, and consequences of evaluation/ assessment results and the impact of associated findings and reports.
- Making prudent, defensible and timely decisions.
- Exercising judgment in determining materiality of evaluation/ assessment results.
- Working independently in the absence of supervision.
- Understanding and following oral and written instructions.
- Communicating clearly and concisely, both orally and in writing; ability to identify stakeholder sensitivities and adapt communications as necessary.
- Ability to organize, structure and frame ideas, issues, and strategies in a clear, focused, and persuasive manner.
- Establishing and maintaining effective working relationships with those contacted in the course of the work.
- Writing clear and concise reports.

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 operational or financial performance management, organizational development, lean process improvement, change management, policy analysis or project management experience, which must have included at least one (1) year of lead 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.

Other Requirements:

Possession of a valid certificate as a Project Management Professional (PMP) is desirable.

WORKING CONDITIONS

Environmental Conditions:

Office environment; field environment; construction site environment; exposure to computer screens; exposure to heat, cold, moving vehicle, electrical energy and inclement weather conditions.

Physical Conditions:

Requires maintaining physical condition necessary for walking, standing or sitting for prolonged periods of time.

BART EEO-1 Job Group: 3500 – Professionals
Census Code: 0710 – Management Analysts
Safety Sensitive: No