



## MANAGER OF PERFORMANCE ANALYTICS

JC: 000203

PB: I

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 direction, plans, directs, manages, supervises and administers the District's performance management program and strategic budget process to establish a framework for setting goals, developing measures, determining performance targets, allocating resources and evaluating results; oversees the development and delivery of performance analytics reports for senior management on all aspects of performance and process improvement initiatives, including developing and maintaining dashboards and other forms of communication; plans, manages and delivers on all performance and process improvement activities to ensure that they extract maximum value; oversees use of change management concepts and tools to build capability within the District to improve processes so that performance continually improves and targets are met; develops District-wide risk assessment approach to budget decisions; aligns, integrates, and coordinates activities of the Budget, Financial Planning, and Performance & Audit departments; and performs related duties as assigned.

### **CLASS CHARACTERISTICS**

This first-level full supervisory/managerial classification is responsible for providing leadership to drive performance-based management and continuous improvement in alignment with the District's strategic goals, including establishing processes that enable departments to effectively measure organizational performance, providing actionable insights that allow for the continuous improvement of business performance, and applying risk-based decision making to budget processes. The classification is accountable for accomplishing the successful execution of a robust business performance management system that aligns with the District's strategic goals and provides change management planning and execution support to a wide variety of stakeholders throughout the District. This classification is distinguished from the Senior Manager of Performance and Innovation in that the latter has overall responsibility for goals and objectives, staff evaluations, and overall activities for the Performance and Innovation Division.

### **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:*

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1. Manages the design and implementation of activities associated with enterprise performance management, including analysis and recommendations of preferred framework and methodologies.
2. Plans, directs, manages, supervises and administers enterprise performance management program; oversees benchmarking and comparative studies of progressive and innovative organizations; reviews District business activities and processes at all levels of management to determine metrics, Key Performance Indicators (KPIs), and performance targets.
3. Manages design, implementation, and updating of dashboards and other forms of communication to senior management; builds internal capability for continuous improvement to ensure that targets are met.
4. Consults and works with all levels of management in the development and implementation of goals, objectives, policies and priorities for performance management; recommends and administers policies and procedures.
5. Oversees preparation of analytical and statistical reports tailored for various levels of District management; manages the systematizing/institutionalizing District-wide performance management analytics.
6. Serves as liaison between all departments and executive offices to identify performance criteria to improve business performance by aligning the appropriate information and resources to strategic goals and objectives.
7. Administers the strategic budget process that integrates the BART Strategic Plan (BSP) with the annual budget using asset management principles for risk-based decision making; assists with developing District-wide risk assessment approach to business decisions.
8. Supervises monitoring of performance related to departmental Four-Year Work Plans and strategic budget initiatives; responsible for continuous refinement of metrics to improve business strategies across the District by establishing scorecards/dashboards that measure business performance.
9. Gathers, evaluates and documents all performance management requirements; fosters real-time business delivery of data to make informed decisions to achieve superior business applications.
10. Aligns, integrates, and coordinates activities of the Budget, Financial Planning, and Performance & Audit departments into the annual budget and Short-Range Transit Plan/Capital Improvement Program.
11. Manages development, analysis and assessment of performance metrics for large process or system transformation projects to build a cohesive system of continuous improvement for the District; develops status reports and regularly reviews project status with management.
12. Oversees 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.

13. Oversees the project management development approach for large systems transformation or process improvement initiatives to ensure on-time completion of project deliverables; implements change management tools to engage and facilitate buy-in from project stakeholders.
14. Oversees continuous improvement initiatives including transformation projects; conducts training and advisory services; participates in the development of training curricula for continuous improvement, including Lean processes, and the documentation and summary of lessons learned from transformation projects/ initiatives.
15. Assists the Senior Manager of Performance & Innovation; advises District management on the compliance, effectiveness, and economy of District activities; provides project management supervision and support for process or system transformation initiatives.
16. Manages data collection activities, 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.
17. 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.
18. Trains assigned employees in their areas of work including methods, procedures and techniques.
19. Oversees and leads the monitoring, administering, and negotiating consultant contracts, coordinates consultant work with other departments, and serves as liaison for analyses and projects.
20. Develops standard operating procedures and policies; monitors and supports transition from project phase to regular operations; conducts follow up assessments as needed.
21. Participates in the preparation and administration of the division program budget; submits budget recommendations; monitors expenditures.
22. 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.
23. Participates in the selection of assigned staff; provides or coordinates staff training; works with employees to correct deficiencies; implements discipline procedures.
24. Plans, prioritizes, assigns, supervises, reviews and participates in the work of staff; ensures work quality and adherence to established policies and procedures; supports team morale and a positive work environment.
25. Participates in special projects as assigned.

**QUALIFICATIONS**

**Knowledge of:**

- Performance management best practices; developing performance measures and Key Performance Indicators (KPIs), determining performance targets, evaluating results, and conducting benchmarking and comparative analyses.
- Risk-based decision making, especially pertaining to public sector budgeting, and short and long-range transit financial planning.
- 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; translating 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:**

- 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; 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.
- Recommending and leading implementation of goals and objectives for performance management, transformation initiatives, and continuous improvement programs; documenting processes and concepts of change management.
- Leading performance or program evaluations, maturity assessments, and process improvements.
- Defining timelines and project plans, coordinating stakeholder participation, supervising analytical and technical staff; managing vendors, contractors and other parties.
- 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.
- Making prudent, defensible and timely decisions.
- Exercising judgment in determining materiality of evaluation/ assessment results; understanding the environment, demands, and consequences of evaluation/ assessment results and the impact of associated findings and reports.
- 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.
- Ability to organize, combine, and tabulate large amounts of data into clear reports, charts, and dashboards that are understandable to stakeholders.
- 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 audit, budget, operational or financial performance management, organizational development, continuous improvement, change management, policy analysis or project management experience, which must have included at least one (1) year of lead and/or supervisory 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:**

A valid certificate as a certified Project Management Professional (PMP) is desired.

### **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:** 1500 – Supervisors/Other  
**Census Code:** 0710 – Management Analysts  
**Safety Sensitive:** No