



# THE STATE BAR OF CALIFORNIA

INVITES YOUR  
INTEREST IN  
THE POSITION OF

## CHIEF FINANCIAL OFFICER



## THE ORGANIZATION

Created by the Legislature in 1927, the State Bar of California is a public corporation with the Judicial Branch of state government, serving as an administrative arm of the California Supreme Court. The State Bar licenses attorneys and regulates the profession and practice of law in California by administering the California Bar Exam; enforcing Rules of Professional Conduct for attorneys; disciplining attorneys who violate rules and laws; advancing access to justice; and promoting diversity and inclusion in the legal system.

The State Bar of California is the largest State Bar in the country and one of the largest in the world. The State Bar licenses more than 260,000 attorneys, investigates approximately 16,000 complaints of attorney misconduct annually, and distributes over \$75 million in grants to legal aid organizations. It is headquartered in San Francisco and also has an office in Los Angeles.

*“The State Bar of California’s mission is to protect the public and includes the primary functions of licensing, regulation and discipline of attorneys; the advancement of the ethical and competent practice of law; and the promotion of efforts for greater access to, and inclusion in, the legal system.”*

The State Bar is led by a Board of Trustees and managed by staff. The Board of Trustees serves as the State Bar’s governing body and develops the guiding policies and principles underpinning its regulatory mission. The Board is comprised of 13 members that include five attorneys appointed by the California Supreme Court, two attorneys appointed by the Legislature; and six “public” (non-attorney) members appointed by the legislature and the Governor. The Executive Director, through and with the Bar’s Leadership Team, is responsible for ensuring that the organization fulfills its mission and achieves the specific goals outlined in the Bar’s strategic plan. The Executive Director’s Leadership Team is comprised of the General Counsel, Chief Trial Counsel, Chief of Programs, Chief Financial Officer, Chief Administrative Officer, and Chief of Mission Advancement & Accountability.

The State Bar is organized into seven functional divisions: Office of General Counsel, Office of Chief Trial Counsel, State Bar Court, Office of Finance, Programs Division, Administrative Division, and Mission Advancement & Accountability Division.

The State Bar is funded largely by annual attorney licensing fees and is not part of the traditional State budget process. However, the majority of the Bar’s funding is dependent on a licensing fee bill that must be approved by the legislature and the Governor each year. The State Bar has a 2020 Adopted Budget that reflects \$211 million in total revenue, \$242

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million in total expenses, and 609 full-time equivalent employees, the majority of whom are represented by Service Employees International Union. Staff is about evenly divided between the State Bar’s offices in downtown San Francisco and downtown Los Angeles. The State Bar owns both of the buildings it occupies.

## THE POSITION

The Chief Financial Officer (CFO) serves under the general oversight of the Executive Director (ED) and is responsible for overseeing, planning, organizing, and directing the State Bar’s financial affairs. This includes budgeting, long-term and short-range fiscal planning, financial analysis and reporting, payroll, general and special fund accounting, investment policy administration, licensee billing, and related responsibilities consistent with accepted financial, budget, and accounting standards.

The CFO is a member of the State Bar’s Leadership Team and is responsible for overseeing budget and personnel in the Office of Finance as well as administering the State Bar’s institutional budget and financial affairs subject to the ED’s overall responsibility to administer the budget, personnel, facilities, and related support activities in accordance with policy parameters established by the Board of Trustees. Although the CFO reports to the ED, he or she has direct access to the Board of Trustees on all financial matters and is expected to act with integrity and independence, should issues arise that need reporting to the Board. The CFO oversees a staff of 16 employees in the Office of Finance.

Essential duties of the CFO may include, but are not limited to, the following:



- Oversees the State Bar's Office of Finance and the State Bar's institutional financial affairs.
- Serves as a member of the Leadership Team and establishes and maintains effective working relationships with colleagues within the State Bar and professional relationship with external constituencies of the State Bar.
- Oversees the planning, development, and administration of all fiscal, budget, and accounting functions, including long-term and short-term budgeting, long- and short-range fiscal planning and forecasting, financial analysis and reporting, investment policy administration, special and general fund accounting, payroll administration, accounts payable and receivable, and related responsibilities in accordance with accepted and prudent accounting and budgeting standards, subject to the general oversight of the ED.
- Provides active performance management of assigned staff, and ensures that subordinate managers and supervisors are practicing effective performance management consistent with overall State Bar policy, subject to the general oversight of the ED.
- Oversees the development and implementation of fiscal policies and budget policies, procedures, systems, and related initiatives consistent with prudent accounting standards and the operational standards of the State Bar, subject to the general oversight of the ED.
- Oversees the formulation and implementation of short-term and long-term goals and plans to improve the efficiency and efficacy of the State Bar's fiscal and budget affairs, processes and operations including policies, procedures, and guidelines, to be utilized by every Office within the State Bar, subject to the general oversight of the ED.
- Represents the State Bar on fiscal and budget matters related to the Board of Trustees and other constituencies.
- Oversees and initiates, as appropriate, inter-office projects, programs, and activities.
- Provides policy guidance and staff assistance to the Board of Trustees and other ad hoc Board Committees and taskforces as required; is directly responsible for staffing the Board's Audit and Finance Committees.
- Responds in a timely manner to inquiries from Board Members, the Judiciary, the Legislature, the Governor's Office, auditors, and other constituencies regarding fiscal and budget matters in coordination with the ED.



## THE IDEAL CANDIDATE

The State Bar of California is seeking a proven leader and seasoned financial professional with a balance of technical and interpersonal skills to serve as CFO and effectively oversee the Office of Finance. The ideal candidate will be someone with a positive attitude, a strong orientation towards customer service, and strong work ethic. He or she will be an innovative and strategic visionary with the ability to evaluate situations that can be controversial, problematic, or sensitive, and present options in a clear and concise fashion, while addressing the full spectrum of financial issues in a timely and appropriate manner. A candidate who exercises a high level of ethics and integrity, is politically adept, yet apolitical, and can interact and work effectively with internal and external stakeholders, is being sought.

The ideal candidate will be someone with a positive attitude, a strong orientation towards customer service, and strong work ethic.

The incoming CFO should be someone who thrives in a fast-paced environment and can perform under pressure and adopt effective courses of action to move the Office forward. This position requires someone who is highly organized and possesses strong time management skills, excellent writing skills, and strong communication and public speaking skills to effectively manage and represent the Office and the organization. The incoming CFO must be capable of receiving, understanding, and conveying detailed information in a manner consistent with job functions and be able to review and analyze complex written and financial data. A

candidate with demonstrated financial dashboards and metrics experience will be valued.

The successful candidate will have knowledge of the advanced principles of accounting, auditing, budgeting, financial controls and reporting, and financial analysis, including Government Accounting Standards and special/general fund administration, payroll and benefit administration, and investment policy; advanced principles of office management, budgeting, administration, and supervision; advanced principles of problem identification, analysis and resolution; advanced principles of public relations/customer service; advanced principles of board and committee administration; principles of effective oral and written communication; principles of computerized financial data and software systems; principles of centralized information and data-based record keeping systems.

At a minimum, candidates must possess a Bachelor's degree in a field that develops skills related to essential duties, or the equivalent academic achievement, and have a minimum of ten (10) years' progressively responsible experience in institutional financial management in a non-profit, public sector, or similar environment, interfacing with governing boards, or the equivalent, including a minimum of five (5) years' senior level management/supervisory experience administering personnel and budget requirements. A public accountant certification (CPA) is required. A Master's degree in a related field is preferred and may be substituted for two (2) years of experience. Candidates must be able to travel by air and automobile, as assigned. Applicants who meet the minimum qualifications will be required to successfully complete the State Bar's selection process for this classification.

## COMPENSATION

The annual salary range for the Chief Financial Officer in 2021 is \$189,000 – \$284,000; placement within this range is dependent upon qualifications. The State Bar also offers an attractive benefits package including:

**Retirement** – The State Bar participates in the California Public Employees' Retirement System (CalPERS) under a 2% @ 55 formula for Classic Members. New (PEPRA) Members (membership after January 1, 2013) are under a 2% @ 62 formula.

**Deferred Compensation** – 457 Deferred Compensation Program available (no matching contribution).

**Insurance** – Medical coverage through CalPERS Health Program. Executive employees pay 20 percent of premium costs.



**Leave Allowance** – Starting with 19 days of vacation and personal leave, 14 holidays, and 12 days of sick leave.

**Additional Benefits** – Dental and Vision, Long Term Disability Insurance coverage, Life Insurance, State Bar-funded retiree health after 15 years of CalPERS service (80 percent paid by State Bar), parking and transit reimbursement program. A modest relocation reimbursement allowance is available.

## TO APPLY

If you are interested in this outstanding opportunity, please visit our website at [www.bobmurrayassoc.com](http://www.bobmurrayassoc.com) to apply online.

**Filing Deadline:  
November 29, 2020**

Following the closing date, resumes will be screened according to the qualifications outlined above. The most qualified candidates will be invited to personal interviews with Bob Murray and Associates. Candidates will be advised of the status of the recruitment following finalist selection. Finalist interviews will be held with The State Bar of California. A select group of candidates will be asked to provide references once it is anticipated that they may be recommended as finalists. References will be contacted only following candidate approval.

If you have any questions, please do not hesitate to call Ms. Valerie Phillips at:

(916) 784-9080

