

### **Position Description**

**JOB TITLE:** Chief Operating Officer (COO)

**DATE:** July 2021

**DEPARTMENT:** Administration

**FLSA STATUS:** Exempt

**OFFICE:** San Francisco

**JOB STATUS:** Regular Full-Time

#### **Reporting and Supervisory Relationships:**

The Chief Operating Officer (COO) reports to the Firm Chair. The following administrative directors report to the Chief Operating Officer:

1. Controller;
2. Director of Technology;
3. Director of Client Services;
4. Director of Human Resources;
5. Director of Legal Services;
6. Chief Talent and Inclusion Officer;
7. Facilities and Business Services Director.

#### **Basic Function:**

The Chief Operating Officer is responsible for managing the administrative operations of the Firm and, as a member of the Executive Team, works to support the Firm's strategic goals.

#### **Essential Functions:**

Essential functions include the following. Some of these functions will be handled directly and others will be delegated and managed. Other duties may be assigned. Regular and predictable attendance in the office is an essential function of the job.

1. **Leadership:** Provides leadership to the Management Team and to all employees. Actively participates on the Executive Team, in Department Chair meetings, in Advisory Board meetings, Partnership Admissions Committee, Diversity, Equity and Inclusion Committee, Space Committee, Retirement Plan Committee, Professional Standards Committee, Emergency Planning and Disaster Recovery Committee and in partnership meetings. Develops and implements plans for the short-term and long-term needs of the Firm. Communicates proactively with the partners to ensure that the administrative services and resources are meeting their expectations and the clients' needs. Seeks input from employees as appropriate and encourages open communication. Keeps the partners and employees appropriately informed and actively participates in annual staff meeting for employees;
2. **Supervision:** Supervises all direct reports, including hiring, orientation, training, coaching, counseling, performance evaluations, and terminations. Creates an environment of accountability for all managers and directors that fosters responsiveness and efficiency

balanced with cost-effectiveness. Conducts regular meetings with direct reports and with the Management Team, promoting teamwork, constructive communication and sound management practices. Provides guidance to the Management Team regarding the preparation and implementation of annual business plans in alignment with the Firm's strategic plan, practice area/industry group plans and other plans as appropriate.

3. **Financial Management:** Directs the preparation of the annual budget for approval by the Partners; monitors the budget monthly. Reviews and analyzes the monthly financial reports prepared by the Accounting Department and recommends corrective action as required. Ensures that costs are reasonable and under control. Maintains working relationships with the Firm's bank. Provides guidance to the Controller and the Director of Human Resources regarding the financial aspects of the Firm's retirement plans.
4. **Practice Management:** Works with the Department Chairs, Practice Area Leaders and Industry Group Leaders to ensure that the attorneys have the resources and support they require to serve the Firm's clients. Provides the industry groups/practice areas with financial reports and analyses. Ensures that attorney recruiting and development activities, marketing initiatives, paralegal management, and practice support are meeting the needs of the practice areas.
5. **Administrative Management:** Directs a cohesive team of managers and directors to effectively manage the operations of the Firm's administrative departments. Ensures that each staff department is providing quality service and support. Promotes an environment that results in continuous improvement. Manages staffing ratios to levels comparable to other similarly situated law firms. In conjunction with the Facilities and Business Services Director, negotiates new contracts with the Business Services vendor as they come due or evaluates new vendors.
6. **Other:** Ensures that the St. Helena office has the support and resources it requires; periodically visits the St. Helena office. Stays current on legal industry trends through continuing education, reading pertinent articles, participating in the relevant professional associations, and establishing networks. Other related duties as assigned.

### **Qualifications:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the education, experience, skills and abilities required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- **Education:** A Bachelor's Degree or equivalent work experience is required; an advanced degree in finance or management is desirable.
- **Experience:** A minimum of seven years of management experience in a professional services environment is required.

- **Expertise:** The requirements listed below are representative of the knowledge, skills, and/or abilities required to perform this job successfully.
  - Strong leadership and management skills;
  - Sound business judgment;
  - Excellent communication and interpersonal skills;
  - Strong supervisory and teambuilding skills;
  - Planning and organizational skills, including the ability to manage a number of projects concurrently;
  - A proactive approach and the ability to work “hands-on” as required;
  - Strong decision-making and problem-solving expertise;
  - Computer proficiency, including MS Word, Excel, Outlook and PowerPoint.
- **Level:** This position exercises a high degree of discretion and independent judgment.
- **Working Conditions:** Normal office environment.
- **Physical Requirements:** The physical demands described here are representative of the requirements that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee will be required to come and go from the work area, talk, listen, use a personal computer and telephone, read and understand documents containing text and/or numbers, and lift and/or move up to 10 pounds. Extended periods of keyboard and mouse use are required.

**Job descriptions do not limit the tasks that an employee may reasonably be requested to perform.** Substantive changes in job descriptions may be necessary as the needs of the Firm change over time. Any substantive changes to this job description will be approved by the Firm’s Chair. This job description in no way alters the Firm’s at-will employment policy.

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