



Orange County Department of Education
Human Resources Department
Confidential Class Specification

Class Code: 5046
Date Adopted: July 1, 2008
Date Revised: February 18, 2015

FLSA Status: Nonexempt
Union Representation: Unrepresented

SUPERVISING LEGAL SECERTARY

GENERAL PURPOSE

Under direction, plans, organizes and supervises the work of legal secretaries performing difficult and highly responsible sensitive and confidential secretarial work for attorneys in OCDE's Legal Services department; serves as a primary assistant to the General Counsel; oversees and performs a variety of specialized administrative duties in support of department operations; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

Supervising Legal Secretary is responsible for supervising, overseeing, and reviewing the work of and providing training and guidance to legal secretaries assigned in the Legal Services department which provides legal consultation and advice and representation services for public school districts, community college districts, regional occupational programs, special education local planning areas, and all OCDE departments. The incumbent serves as primary assistant to and provides a variety of complex, sensitive, and confidential executive and legal support services to the General Counsel. The incumbent interacts on behalf of the General Counsel and other staff attorneys with a wide variety of clients on legal matters that are often urgent and very sensitive in a varied and fast-paced environment. Duties and responsibilities are carried out with considerable independence within the framework of established policies, procedures, and guidelines.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.

1. Plans, organizes, supervises, and evaluates the work of assigned staff; with staff, develops, implements, and monitors work plans to achieve assigned goals and objectives; participates in developing, implementing, and evaluating work programs, plans, processes, systems, and procedures to achieve program and OCDE goals, objectives and performance measures consistent with OCDE's quality and service expectations.
2. Plans and evaluates the performance of assigned staff; establishes performance requirements and personal development targets; regularly monitors performance and provides coaching for performance improvement and development goals; subject to management concurrence takes disciplinary action, up to and including termination, to address performance deficiencies, in accordance with OCDE's human resources policies and labor contract provisions.

ESSENTIAL DUTIES AND RESPONSIBILITIES (cont.)

3. Provides day-to-day leadership and works with staff to ensure a high performance, customer service-oriented work environment which supports achieving OCDE objectives and service expectations; provides leadership and participates in programs and activities that promote a positive employee relations environment.
4. On a daily basis, evaluates office work flow, establishes priorities for legal secretarial staff and delegates or assigns work to meet office requirements and timeframes; periodically reassesses office goals with the attorneys and paralegal; schedules and monitors cross-training activities; develops written handbooks, guidelines, checklists and other tools to achieve effective administrative support operations.
5. Participates in development of the annual department budget; monitors expenditures and budget status and prepares fund transfers to cover projected expenditures when required; prepares Legal Services financial reports, including a breakdown of charges by department and district, outside counsel costs, and case settlement payment amounts; prepares and processes requisitions and purchase orders; reviews accuracy and processes vendor invoices for payment; processes annual contract requests for outside legal counsel and independent contractors; prepares payment and invoice requests in accordance with case settlement agreement terms to meet required payment deadlines; orders and maintains an inventory of supplies and materials.
6. Collaborates with Information Technology staff to gather information. Analyzes information to determine and verify it either meets the criteria for Public Records Act requests or for e-Discovery needs, redacts personal and/or identifying information.
7. Facilitates document management in response to Public Records Act requests, subpoenas, and personnel and student records requests; reviews, processes, and/or coordinates with relevant staff to ensure quality and timely response to requests; tracks due dates; reviews request, identifies custodians of records; requests, collects, and analyzes records to identify exempt and privileged records; categorizes PRA requests.
8. Assists with assessment of e-Discovery needs and issues to implement appropriate electronically stored information (ESI) procedures to preserve evidence; analyzes a client's ESI system and storage for search capabilities; identifies custodians of relevant ESI and develops litigation hold lists; works with information technology staff to perform appropriate searches; identifies and collects appropriate ESI.
9. Serves as primary assistant to the General Counsel; represents that executive in providing information on OCDE policies and procedures and interacting with OCDE administrators, officials of other districts and agencies, managers, principals and staff, and with external stakeholders on a wide variety of issues; handles a variety of administrative tasks not requiring the executive's immediate attention.
10. Transcribes and types legal pleadings, contracts, leases, agreements, resolutions, licenses, and a wide variety of other legal forms, correspondence, reports, and documents from dictation, rough copy or notes, with minimum supervision by an attorney; prepares and assembles information into proper legal form following established procedures or general instructions; proofreads and corrects forms, documents, and pleadings in order to assure accuracy of records and entry of information.
11. Keeps current on filing and service time limits and deadlines; calendars appointments, meetings, hearings, depositions, court appearances, and document and filing deadlines for attorneys, using an electronic calendar system; types requests for production of legal documents; copies, mails, faxes, and arranges delivery of documents and exhibits; reserves conference rooms and coordinates arrangements including catering for meetings, conferences, and training sessions.

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12. Assists paralegal with research as requested, monitors and tracks legislation, and provides written summaries to attorneys.
 13. Creates and maintains a variety of legal files in order to provide easy access to records with limited direction or supervision; maintains active litigation/hearing, work and research files; archives files and purges inactive files in accordance with OCDE's records retention schedule.

ESSENTIAL DUTIES AND RESPONSIBILITIES (cont.)

14. Answers and screens a high volume of telephone calls, providing information and handling issues that often require sensitivity and use of sound independent judgment; opens, logs, and routes incoming and outgoing mail; assesses the urgency of incoming correspondence; makes and confirms conference and travel arrangements.

OTHER DUTIES

1. Oversees maintenance of the law library; orders and replaces education law and other legal publications to ensure up-to-date information.
2. Performs department payroll and time reporting duties.

QUALIFICATIONS

Knowledge of:

1. Advanced office administrative and management practices and procedures applicable to a legal office.
2. Principles and practices of sound business communication; correct English usage, including spelling, grammar, and punctuation.
3. OCDE organization, rules, policies, administrative regulations, procedures, and provisions of the Education Code applicable to areas of assigned responsibility.
4. The role and responsibilities of a public governing board and applicable state law, code, and regulations governing the conduct of public meetings and maintenance of public records.
5. Basic principles and practices of public administration, including purchasing and maintenance of public records.
6. Legal terminology, forms, documents, and court/administrative agency rules, filing requirements, and timeframes used in legal practice and proceedings.
7. Legal references materials and their contents.
8. Statutory deadlines for responding to and/or filing pleading documents.
9. Proper preparation of pleadings, briefs, and legal forms.
10. Principles and practices of effective supervision.
11. OCDE human resources policies and procedures and labor contract provisions.

Ability to:

1. Plan, organize, and carry out daily activities and administrative functions of the General Counsel's office in a sensitive and highly visible political and organizational environment requiring management of multiple and changing priorities.

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2. Organize, set priorities, and exercise sound independent judgment within areas of responsibility.
 3. Interpret, apply, explain, and reach sound decisions in accordance with laws, regulations, rules, and policies.

Ability to (cont.):

4. Plan and make event arrangements, including facilities locations, food/refreshments, audiovisual equipment set up, and materials for distribution, with high attention to detail.
5. Type accurately at 50 WPM.
6. Operate a computer and word processing software and other standard office equipment.
7. Organize, research, and maintain legal and office files and calendars with a high degree of accuracy.
8. Compose correspondence and prepare standard legal documents from brief instructions with a high attention to detail and accuracy.
9. Maintain highly sensitive and confidential information.
10. Deal with sensitive and difficult situations.
11. Establish and maintain highly effective working relationships with OCDE executives, executives and legal counsel of agencies served by Legal Services, staff, outside legal counsel, litigants and claimants, and others encountered in the course of work.
12. Demonstrate attendance sufficient to complete the duties of the position as required.

Education, Training, and Experience:

A typical way of obtaining the knowledge, skills, and abilities outlined above is an Associate's degree in management, communications, or a related field; and at least seven years of increasingly responsible law office administrative or secretarial experience; or an equivalent combination of training and experience.

PHYSICAL AND MENTAL DEMANDS

The physical and mental demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this job, employees are regularly required to sit, walk, and stand; talk or hear, both in person and by telephone; use hands repetitively to finger, handle, feel, or operate computers and standard office equipment; reach with hands and arms from the waist to at or above shoulder level; bend, stoop, push, pull, grasp, squat, kneel, and twist to open file cabinet drawers, and lift up to 25 pounds from ground, waist, and chest level. Travel over uneven terrain that may include gravel or dirt, carry materials on stairs; some locations may have stairs and will not have elevators.

Specific vision abilities required by this job include close vision and the ability to adjust focus.

Mental Demands

While performing the duties of this class, employees are regularly required to use written and oral communication skills; read and interpret complex data, information, and documents; analyze and solve non-routine problems; learn and apply new information; perform highly detailed work on multiple, concurrent tasks; meet intensive and

changing deadlines with constant interruptions; and interact with OCDE executives, executives and legal counsel of agencies served by Legal Services, staff, outside legal counsel, litigants and claimants, and others encountered in the course of work.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Employees work under typical office conditions, and the noise level is usually quiet.