



Orange County Department of Education
Human Resources Department
Confidential Class Specification

Class Code: 5045
Date Adopted: July 1, 2008
Date Revised: October 27, 2014

FLSA Status: Nonexempt
Union Representation: Unrepresented

LEGAL SECRETARY

GENERAL PURPOSE

Under general supervision, performs difficult and highly responsible sensitive and confidential legal secretarial work for attorneys in OCDE's Legal Services department; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

Legal Secretaries perform a variety of difficult and highly responsible legal secretarial and administrative support tasks in a legal department that 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. Incumbents provide legal secretarial support to assigned attorneys and interact on behalf of attorneys with a wide variety of clients on legal matters that are often urgent and very sensitive in a varied and fast-paced environment. Work requires a thorough knowledge of legal procedures and terminology.

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. 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.
2. 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.
3. 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.

ESSENTIAL DUTIES AND RESPONSIBILITIES (cont.)

4. 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.
5. Formulates searches for legal opinions maintained in internal legal database searches external public agency databases for guidance documents; queries and searches online legal research systems for statutes and case law relevant to legal matters; formulates searches on Internet for non-legal information.
6. 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.
7. 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; makes and confirms conference and travel arrangements.
8. Records and tracks attorney and paralegal time spent on special education legal matters in legal billing system, invoices, tracks, and posts payments, reconciles accounting records and runs a variety of legal time and billing reports.

OTHER DUTIES

1. Types and faxes cover memos, opinion letters and workbooks.
2. Files legal documents with applicable courts or administrative agencies.
3. Participates in developing handbooks and reference guides for use by other legal secretaries.

QUALIFICATIONS

Knowledge of:

1. Legal terminology, forms, documents, and court/administrative agency rules, filing requirements, and timeframes used in legal practice and proceedings.
2. Federal and state e-discovery rules.
3. Electronic legal research and legal billing software.
4. Legal references materials and their contents.
5. Statutory deadlines for responding to and/or filing pleading documents.
6. Proper preparation of pleadings, briefs, and legal forms.
7. Law office administrative practices and procedures.
8. Principles and practices of sound business communication.
9. Correct English usage, including spelling, grammar, and punctuation.

Ability to:

1. Operate a computer and word processing software and other standard office equipment.
2. Type accurately at 50 WPM.
3. Organize, set priorities and exercise sound independent judgment within areas of responsibility.

Ability to:

4. Problem-solve routine administrative legal matters.
5. Plan and make event arrangements, including facilities locations, food/refreshments, audiovisual equipment set up and materials for distribution, with high attention to detail.
6. Interpret, apply, explain, and reach sound decisions in accordance with laws, regulations, rules, and policies.
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. Utilize redlining and document compare functions within word processing software.
10. Communicate clearly and effectively orally and in writing.
11. Prepare clear, accurate, and concise records and reports.
12. Maintain highly sensitive and confidential information.
13. Deal with sensitive and difficult situations.
14. 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.
15. 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 graduation from high school or G.E.D. equivalent, and three years of secretarial or clerical experience in a law office; 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 information and documents; analyze and solve problems; learn and apply new information; perform highly detailed work on multiple, concurrent tasks; meet intensive and changing deadlines 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.