



MENDOCINO COUNTY CIVIL SERVICE COMMISSION

AGENDA

PATRICIA L. GUNTLY
1ST DISTRICT
COMMISSIONER

TERRY POPLAWSKI
2ND DISTRICT COMMISSIONER
CHAIR

RON ORENSTEIN
3RD DISTRICT COMMISSIONER
VICE CHAIR

GINNY FETH-MICHEL
4TH DISTRICT
COMMISSIONER

MARILYN HARDEN
5TH DISTRICT
COMMISSIONER

DATE: Wednesday, April 19, 2017
TIME: 9:00 A.M.
PLACE: Board of Supervisors Chambers
501 Low Gap Road, Room 1070
Ukiah, CA 95482

ORDER OF AGENDA

The County is committed to making its Commission meetings accessible to all citizens. Individuals with special needs may call telephone number (707) 234-6600, email hr@co.mendocino.ca.us, or send a facsimile transmission to (707) 468-3407.

AGENDA ITEM NO. 1 – ROLL CALL

AGENDA ITEM NO. 2 - APPROVAL OF MINUTES

Approval of Minutes of March 15, 2017 Commission Meeting.

AGENDA ITEM NO. 3 - PUBLIC EXPRESSION

This is an opportunity for the public to speak to the Commission on any item other than those listed for Commission consideration on this agenda. If you wish to speak, please use the microphone at the lectern. Please begin by stating your name, whether you reside within the county, and the name of the organization you represent, if any. The Chair of the Commission may impose a time limit on any speaker depending on the number of people wanting to speak and time available for the rest of the agenda. In the event comments are related to an item scheduled on the agenda, speakers may be required to wait to make their comments until that item is considered.

AGENDA ITEM NO. 4 - EMPLOYEE ORGANIZATION

This agenda item is to be used for Employee Organization representatives to present information/requests to the Civil Service Commission.

AGENDA ITEM NO. 5 - HUMAN RESOURCES DIRECTOR REPORT

This agenda item is to be used for the Human Resources Director to provide information to the Commission regarding Human Resources issues.

AGENDA ITEM NO. 6 – CLASSIFICATION STUDY / CLASSIFICATION SPECIFICATION MODIFICATION

- A. Classification Study – District Attorney’s Office – Office Services Supervisor
- B. Classification Study – Public Defender’s Office – Legal Secretary

The Civil Service Commissioners request the appearance of any Department Head/representative at meetings that have matters relevant to their department. Failure to attend may result in delays in action of agenda items or denial of presented requests.

AGENDA ITEM NO. 7 – ADJOURN TO CLOSED SESSION – PERSONNEL MATTER

Any public reports of action taken in the closed session will be made in accordance with Government Code sections 54957.1.

- A. Pursuant to Government Code Section 54957(b) – Public Employee Performance
(Extension of Probationary Period)
Title: HHSA – Compliance Manager

- B. Pursuant to Government Code Section 54957(b) – Public Employee Performance
(Extension of Probationary Period)
Title: Executive Office – Administrative Assistant

AGENDA ITEM NO.8 – RECONVENE TO OPEN SESSION

Report of action taken in Closed Session

AGENDA ITEM NO. 9 - ADJOURN

The meeting will adjourn when all business to be presented has been covered.



**CIVIL SERVICE COMMISSION
COUNTY OF MENDOCINO
501 Low Gap Road, Room 1326
Ukiah, CA 95482**

**SUMMARY/ACTION MINUTES
Civil Service Commission**

DATE: Wednesday, March 15, 2017

PLACE: Board Chambers
501 Low Gap Road
Ukiah, CA 95482

TIME: 9:00 A.M.

ALSO PRESENT: Juanie Cranmer, Human Resources Manager
Kellie Tucker, Staff Assistant III
Shellie Tubbs, Office Services Supervisor
Tim Mitchell, HR Analyst II

CALL TO ORDER

February 15, 2017, Civil Service Commission meeting was called to order at 9:05 A.M. by Chair Poplawski.

AGENDA ITEM NO. 1 – ROLL CALL

Present: Commissioners Harden, Orenstein, Guntly, and Poplawski. Chair Poplawski presiding.

Absent: Commissioner Feth-Michel

AGENDA ITEM NO. 2 – APPROVAL OF MINUTES

COMMISSION ACTION: Upon motion by Commissioner Orenstein, seconded by Commissioner Harden, and carried (4/0); IT IS SO ORDERED that the minutes of the February 15, 2017, Commission meeting are approved.

AGENDA ITEM NO. 3 – PUBLIC EXPRESSION

None.

AGENDA ITEM NO. 4 – EMPLOYEE ORGANIZATION

None

AGENDA ITEM NO. 5 – HUMAN RESOURCES DIRECTOR REPORT

PRESENTER/S: Juanie Cranmer, Human Resources Manager

Ms. Cranmer advised that Human Resources is currently working on a variety of statistics for the Board of Supervisors for their budget workshop and if the Commissioners would like the report, we can provide once they are completed. Chair Poplawski mentioned that he did see the display boards in the Administrative Hallway that was advertising County job openings.

AGENDA ITEM NO. 8 – ADJOURN TO CLOSED SESSION – PERSONNEL MATTER

Any public reports of action taken in the closed session will be made in accordance with Government Code section 54957.1.

- A. Pursuant to Government Code Section 54957(b) – Appeal
Title: Administrative Services Manager II
- B. Pursuant to Government Code Section 54957(b) - Public Employee Performance Evaluation
(Extension of Probationary Period)
Title: HHSA – Eligibility Worker I

ADJOURNED TO CLOSED SESSION: 9:10 A.M.

RECONVENED IN OPEN SESSION: 10:44 A.M.

AGENDA ITEM NO. 9 – RECONVENE TO OPEN SESSION

Report of action taken in Closed Session

A. COMMISSION ACTION: Upon motion by Commissioner Harden, seconded by Commissioner Guntly, and carried (3/1/1 Commissioner Orenstein dissenting, Commissioner Feth-Michel absent); IT IS SO ORDERED that the appeal is denied.

B. COMMISSION ACTION: By unanimous vote (4/0); IT IS SO ORDERED that the extension of probationary period is approved.

AGENDA ITEM NO. 10 – ADJOURN

THERE BEING NOTHING FURTHER TO COME BEFORE THE COMMISSION, THE MENDOCINO COUNTY CIVIL SERVICE COMMISSION IS ADJOURNED AT 10:45 A.M.

Juanie Cranmer
Human Resources Manager and Secretary to the Civil Service Commission



HUMAN RESOURCES – MENDOCINO COUNTY

DATE: April 13, 2017
TO: Civil Service Commission
FROM: Tim Mitchell, Human Resources Analyst
SUBJECT: District Attorney's Office Classification Study – Office Services Supervisor

BACKGROUND & ANALYSIS

The District Attorney (DA) submitted a request for a classification study of Office Services Supervisor incumbent Carmen Macias. The incumbent completed a Position Description Questionnaire (PDQ) and HR staff conducted the study.

The concern of the DA is that the duties assigned to the Office Services Supervisor had gradually evolved to include areas greater in scope than that of the Office Services Supervisor classification and is actually performing the duties of the department's Administrative Services Manager II position. As stated within its classification specification, Office Services Supervisor is distinguished from the Administrative Services Manager series by the latter having responsibility for managing the overall fiscal and administrative functions of a department, including supervising subordinate supervisors, heavy involvement in (and greater responsibility for) budget development, implementation, and tracking for the assigned division or department. Ms. Macias has assumed the role of primary budget coordinator, supervising the work of staff in maintenance and preparation of the office's annual budget. In addition, Ms. Macias supervises not only the technical, paraprofessional, and support staff, she also exercises direct supervision over supervisory staff.

Based on the size of the DA's Office and Ms. Macias' role within that organization, she is assuming the full scope of duties of Administrative Services Manager II.

RECOMMENDATION

It is recommended that the Commission authorize the reclassification of current Office Services Supervisor, Carmen Macias, to Administrative Services Manager II.



**ADMINISTRATIVE SERVICES
MANAGER II**

Class Code:
0135

SALARY RANGE

\$32.54 - \$39.55 Hourly
\$2,603.20 - \$3,164.00 Biweekly
\$67,683.20 - \$82,264.00 Annually

THE POSITION:

JOB SUMMARY:

Under direction, plans, organizes and manages fiscal, administrative and support operations and staff of a department or a division within a large department; oversees and performs duties in support of budget development and management, grant administration, collections, accounting work, strategic planning, organizational oversight and policy development/implementation. Typically, there is only one Administrative Services Manager per department; however, a very large department with multiple divisions may allocate an Administrative Services Manager I level to more than one division. Not all County departments require an Administrative Services Manager.

DISTINGUISHING CHARACTERISTICS

The Administrative Services Manager series manages and performs work of considerable difficulty in the planning, coordinating, and directing of fiscal, administrative, and support operations of a County department or a division of a large department. The Administrative Services Manager series is distinguished from other management classes by its primary responsibility for managing, overseeing and performing advanced fiscal and support operations. Administrative Services Manager is further distinguished from Office Services Supervisor by its responsibility for managing the overall fiscal and administrative functions of a department or division of a large department which includes supervising subordinate supervisors, strategic planning, heavy involvement in, and greater responsibility for, budget development, implementation, and tracking for the assigned division or department.

Administrative Services Manager II is distinguished from the I level by its assignment to serve a department and a higher level of budget and fiscal responsibility with a greater impact on the assigned department's operations and overall strategy.

SUPERVISION EXERCISED

Exercises direct supervision over professional, technical, supervisory, and support staff.

EXAMPLES OF DUTIES AND ESSENTIAL JOB FUNCTIONS:

Duties may include but are not limited to the following:

- Manages fiscal, administrative, and support services in accordance with policies, procedures, and applicable law in a department by planning, assigning and supervising professional, administrative and technical support staff and programs responsible for preparing and monitoring department budget, information technology systems, accounting functions,

inventory, cash receipts, accounts receivable and payable, cost accounting, and payroll; reviews and approves financial reports; monitors progress in the achievement of established targets in order to meet departmental goals and objectives.

- Monitors and evaluates the efficiency/effectiveness of operational performance, methods of service delivery and procedures by reviewing workload and support systems to identify opportunities for improvement; develops, recommends and implements modifications to programs, policies and procedures and/or new concepts and innovations in work processes to enhance operational efficiency.
- Selects, supervises, trains, and evaluates assigned personnel; provides for staff training; works with employees to correct deficiencies; implements discipline and termination procedures.
- Prepares complex, routine and non-routine reports as requested utilizing a variety of software; receives, sorts, and summarizes materials for the preparation of reports; prepares work reports; completes surveys; relays and interprets administrative decisions, policies, and instructions.
- Establishes, reviews, revises and communicates policies to staff and other interested parties; ascertains the impact of new or revised policies and disseminates pertinent information to affected parties; assists in planning and implementing short-term or annual goals, objectives, and strategies for the department, projects, or programs, to ensure efficient organization and completion of work.
- Oversees department personnel and payroll functions, including approving personnel transactions.
- Directs the departmental budget process from initial development through review and implementation by coordinating budget activities of divisions/sections within the assigned department in order to forecast the need for additional funds for staffing, equipment, materials and supplies; maintains budgetary control by overseeing and approving expenditures, evaluating the need for augmentation and preparing/implementing budgetary adjustments to ensure adherence to the approved budget.
- Performs financial analysis and/or provides data at the request of the manager, other officials, and the public.
- Obtains financing for projects through grants; writes grant applications and monitors grant documents from initial application to the final reimbursement request to ensure that grant requirements (both reporting and operational) are met and monies are not forfeited.
- Serves as staff liaison to the County Board of Supervisors and Office of the County Administrator by effectively providing comprehensive information covering a variety of issues in various formats, public meetings, closed sessions and in writing; serves as information source to the public governmental agencies and county departments regarding the departmental operations.
- Determines departmental requirements for equipment, information systems, office space, supplies and related resources through needs assessment and coordinates their acquisition/installation and subsequent training for staff to ensure smooth and efficient operations.
- Prepares and/or assists in the preparation and/or negotiation of contracts, resolutions, and agenda summary forms.
- Ensures that assigned staff performs duties and responsibilities in a safe and prudent manner, which does not expose them or others to unnecessary harm or risk of on-the-job injury.
- Maintains and upgrades knowledge, skills and abilities by attending and participating in seminars, training programs and professional groups; stays abreast of new trends and innovations in the field by reading trade and professional journals and publications.
- Performs other related duties as assigned,

MATERIAL AND EQUIPMENT USED:

Calculator
General Office Equipment
Computer

MINIMUM QUALIFICATIONS REQUIRED:

Education and Experience

A bachelor's degree from an accredited college or university in finance, accounting, public administration, or a closely related field; AND five (5) years of responsible, wide-ranging experience providing financial management and administrative support services, including staff supervision and budget development; OR, two (2) years of experience equivalent to that of an Administrative Services Manager I with Mendocino County; or an equivalent combination of training and education.

Substitution: Related experience may be substituted for up to two (2) years of the education at a rate of two (2) years of experience to one (1) year of education.

License or Certificate:

Valid CA driver's license.

KNOWLEDGE, SKILLS, AND ABILITIES:

Knowledge of:

- Administrative and management principles and practices, including personnel administration, budget control, goal setting and implementation.
- Principles and practices of effective supervision and training.
- Governmental financial operations.
- Generally accepted accounting and budgeting principles as applied to governmental accounting.
- Computer applications and hardware related to the performance of the essential functions of the job.
- Department policies and procedures.
- Collective bargaining agreement provisions applicable to assigned staff.
- Personnel policies.
- Principles and practices of budget administration.
- Pertinent financial Federal, state and local laws, codes and regulations.
- Financial software packages, including spreadsheets and databases.
- Methods and techniques of research, statistical analysis and report presentation.
- Correct English usage, including spelling, grammar, punctuation, and vocabulary.
- Principles of organizational development.
- Principles and practices of grant administration.
- Financial management practices and standards used in the public sector.

Skill In:

- Using tact, discretion, initiative and independent judgment within established guidelines.
- Organizing work, setting priorities, meeting critical deadlines, and following up on assignments with a minimum of direction.
- Preparing clear and concise reports, correspondence and other written materials.
- Managing and evaluating the operations and functions of the assigned department.
- Planning, organizing, assigning, directing reviewing, evaluating, selecting, motivating, and

training staff.

- Developing and implementing, objectives and procedures for effective and efficient administrative, budget and support services.
- Analyzing problems, project consequences of proposed actions, identify alternative solutions, and implement recommendations in support of goals and objectives, including the provision of efficient and cost-effective services.
- Administering annual budgets, including monitoring and approving expenditures; preparing and implementing budgetary adjustments, as necessary.
- Writing clear and concise narrative and financial reports.
- Interpreting and applying pertinent policies, procedures, laws, codes and regulations.
- Using a computer to accurately and rapidly enter and retrieve data and information.

- Evaluating and organizing the operations and functions of the assigned department.
- Developing and preparing complex annual budgets, including forecast revenues and expenses; allocate limited resources in a cost effective manner.
- Completing grant applications and monitoring the flow of grant documents from initial application to the final reimbursement request.
- Researching, analyzing and evaluating new service delivery methods, procedures and techniques.
- Designing and delivering effective presentations of budgets, plans, policies and objectives to boards, commissions, public groups and civic organizations, tailoring the message for the targeted audience.

Mental and Physical Ability to:

- Understand and carry out written and oral instructions, giving close attention to detail and accuracy.
- Operate modern office equipment including computer equipment and financial software.
- Communicate in a clear concise manner, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Read, analyze, and interpret professional periodicals and journals, technical procedures and government regulations.
- Apply concepts such as fractions, percentages, ratios and proportions to practical situations.
- While performing the essential functions of this job the employee is regularly required to sit, use hands to finger, handle, or feel, and speak and hear.
- Lift and carry, push and/or pull, or move objects weighing up to 20 pounds.

OTHER INFORMATION:

Working Conditions:

Work is performed in a normal office environment with little exposure to outdoor temperatures or dirt and dust. Incumbents must have the ability to travel to different sites and locations. The incumbent's working conditions are typically moderately quiet, but may be loud at times and at some locations.

This class specification should not be interpreted as all-inclusive. It is intended to identify the essential functions and requirements of this job. Incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this specification. Any essential function or requirement of this class will be evaluated as necessary should an incumbent/applicant be unable to perform the function or requirement due to a disability as defined by the Americans with

Disabilities Act (ADA). Reasonable accommodation for the specific disability will be made for the incumbent/applicant when possible.

CLASS TITLE: ADMINISTRATIVE SERVICES MANAGER II

CLASS CODE: 0135

DEPARTMENT: VARIOUS

FLSA STATUS: EXEMPT: E

REPORTS TO: VARIOUS

DATE: 05/03 REV: 2/07

CIVIL SERVICE: YES

BARGAINING UNIT: MGT

**MENDOCINO COUNTY GOVERNMENT
CLASS SPECIFICATION**

CLASS TITLE: OFFICE SERVICES SUPERVISOR
DEPARTMENT: VARIOUS
REPORTS TO: VARIOUS
CIVIL SERVICE:

CLASS CODE: 0067/ CONF 0066
FLSA STATUS: N
DATE: 10/99 Rev. 2/07
BARGAINING UNIT: SEIU or CONFIDENTIAL

JOB SUMMARY:

Supervises staff and performs a variety of highly complex administrative functions in support of a department director or a division director of a large department. Examples of duties include: coordinating work processes; training staff and appraising performance; developing various complex (often confidential) reports requiring extensive research and gathering of information and/or statistics; maintaining personnel files and generating related paperwork; preparing and or monitoring contracts and related documents; developing and maintaining various filing systems; assisting in and/or developing policies and procedures; and developing the budget and tracking budget expenditures.

DISTINGUISHING CHARACTERISTICS:

Office Services Supervisor is a first-line supervisor distinguished from Supervising Staff Assistant by the responsibility of the Office Services Supervisor for overseeing the support operations of a department, including involvement in budget development and monitoring, as well as responsibility for developing and implementing policies and procedures related to the administrative support functions of the assigned department. While the Supervising Staff Assistant class is also a first-line supervisor, duties are focused on supervising and participating in the work being performed with no responsibility for oversight of the support services of the department. Office Service Supervisor is distinguished from Administrative Assistant by its supervisory duties and major role in budget development. Office Services Supervisor is distinguished from the Administrative Services Manager series by the latter having responsibility for managing the overall fiscal and administrative functions of a department including supervising subordinate supervisors, heavy involvement in, and greater responsibility for, budget development, implementation, and tracking for the assigned division or department.

SUPERVISION EXERCISED:

Exercises direct supervision over technical/paraprofessional, and/or support staff.

ESSENTIAL JOB FUNCTIONS: *Duties may include but are not limited to the following:*

- Carries out supervisory/managerial responsibility in accordance with policies, procedures and applicable laws including: interviewing, hiring and training, planning, assigning and directing work, establishing deadlines, appraising performance, rewarding and disciplining employees, addressing complaints and resolving problems.
- Oversees the daily office procedures and workflow of the department as well as many of the business functions of the department; performs clerical functions, legal work, fiscal operations, etc., unique to department; processes routine and non-routine matters independently; receives, reviews and processes various financial records and transactions, ensuring accuracy and adherence to policy and applies approval; relieves director or elected officials of routine administrative details such as checking operating reports for accuracy and conformance to policies and standards; monitoring and communicating departmental policies and procedures, and updating publications for final approval. Provides information, advice, feedback, or assistance to others within the department to refine work outputs or resolve problems. Reports unresolved administrative and/or operational problems to supervisor.
- Participates in developing and monitoring the division/department budget by researching and justifying requests, advising on choices, making recommendations, typing, calculating, and coordinating completion; maintains budget records throughout the year, balances and reconciles budget, and prepares quarterly financial reports; attends budget meetings/hearings.
- Develops, communicates, and monitors policies, procedures, and standards for the division or department related to administrative support functions; recommends improvement when necessary.
- Relays and interprets administrative decisions, policies and instructions; answers various inquiries; explains policies and procedures and arranges appointments.
- Analyzes and interprets new legislation, codes, mandates, etc., and disseminates information to staff.
- Prepares payroll reports for assigned division or department. Prepares and processes claims, purchase orders and/or vouchers by entering pertinent information into the computer and distributing and/or filing supporting documents. Takes in, accounts for and issues receipts for money and makes daily or weekly bank deposits.

- Coordinates division/department information systems projects/needs, arranges for system or software installation or upgrades and/or performs or schedules related training for staff members.
- Maintains, reviews, and processes various permits, applications, and other documents.
- Processes and maintains all confidential personnel records and payroll information for the division/department, including generating personnel transactions, setting up interviews, maintaining filing system.
- Formats and types letters, memos, charts, labels, reports, or other correspondence on a computer, word processor or typewriter and proofs correspondence and related documents; composes correspondence in accordance with standard policies; types documents containing complex terminology; prepares complex, routine and non-routine reports (including annual reports) as requested utilizing a variety of software; receives, sorts, and summarizes material for the preparation of reports; prepares work reports; composes confidential correspondence and maintains files associated with same.
- Maintains contracts which include monitoring flow of documents, consulting with and advising staff of essential elements of contracts, conferring with financial staff, and managing related filing systems.
- Acts as secretary to government boards or commissions, including coordinates and schedules meetings, prepares the location and agendas, transcribes and/or distributes statements, minutes and notes from a variety of sources.
- Researches information needed for and administers grants; manages related filing system and billing.
- Confers with upper management to keep them informed on key issues and progress toward objectives and to gain their support and approval; makes recommendations to assist management in making needed improvements.
- Maintains and upgrades professional knowledge, skills, and development by attending seminars and training programs and reading trade and professional journals and publications.
- Interacts with a variety of high-level individuals, both internally and within the community to provide information, disseminate departmental information and assist in resolving administrative issues.
- Takes policy, service and information requests and refers to proper divisions for processing and providing information; updates and maintains service and information requests through complex record keeping; performs reference and statistical work on computers, maintains and files confidential and other specialized reports.
- Disseminates a variety of information and/or reports to various agencies, divisions, or departments via telephone, mail, email or fax.
- May serve as backup for other positions within the department.
- Performs other related duties as assigned.

MATERIAL AND EQUIPMENT USED:

Personal Computer and/or Terminal	Typewriter	General Office Equipment
Microfiche Machine	Paging System	Transcription Equipment
Cassette Duplicating Equipment		

MINIMUM QUALIFICATIONS REQUIRED:

Education and Experience:

Associate's degree or equivalent from a two-year college; AND, four (4) years of progressively responsible experience performing administrative and office duties, such as developing and tracking budgets and maintaining confidential personnel information, with at least one (1) year of demonstrated lead-worker experience; or an equivalent combination of related training and education.

Licenses and Certifications:

None

KNOWLEDGE, SKILLS, AND ABILITIES:

Knowledge of:

- Principles and practices of supervision and training.
- Administrative principles and practices including goal setting and implementation.
- Administration of staff and activities either directly or through subordinate supervision.
- Laws, legislation, codes, ordinances that govern the work.
- Correct English usage, including spelling, grammar, punctuation, and vocabulary.

- Internal departmental policies and procedures.
- General accounting processes and procedures.
- County government organization and operations.
- Lease and contract administration.
- Computerized legal research.
- Grant research and administration.
- Office administrative and secretarial practices and procedures, such as business letter writing and the operation of standard office equipment, including a word processor and personal or on-line computer.
- External governmental bodies and agencies related to area of assignment.
- Standard business arithmetic, including percentages and decimals.
- Budget development and management.
- Personnel policies and practices.
- Record keeping, report preparation, filing methods and records management techniques.
- General office procedures, policies and practices, as well as knowledge of computer applications and hardware and other general office equipment related to the performance of the essential functions of the job.

Skill in:

- Planning, organizing, assigning, directing, reviewing and evaluating the work of staff.
- Selecting and motivating staff and providing for their training and professional development.
- Preparing clear and concise reports, correspondence and other written materials.
- Using tact, discretion, initiative and independent judgment within established guidelines.
- Analyzing and resolving office administrative situations and problems.
- Researching, compiling, and summarizing a variety of informational and statistical data and materials.
- Organizing work, setting priorities, meeting critical deadlines, and following up on assignments with a minimum of direction.
- Typing from rough draft or printed text using a keyboard at a speed sufficient to perform the duties of the job.
- Communicating clearly and effectively, both orally and in writing, with internal staff, citizens, and other departmental staff in order to give and receive information in a courteous manner.
- Operating and performing routine maintenance of general office machines.

Mental and Physical Ability to:

- Read and interpret documents such as operation and maintenance instructions, procedure manuals etc.
- Understand and carry out written and oral instructions, giving close attention to detail and accuracy.
- Rapidly and accurately take and transcribe oral or tape dictation using speedwriting, shorthand, or dictating equipment (at the discretion of the supervisor).
- Apply logical thinking to solve problems or accomplish tasks, understand, interpret and communicate complicated policies, procedures and protocols.
- Establish and maintain effective working relationships with others.
- Draft and type correspondence.
- Add, subtract, multiply and divide whole numbers, common fractions and decimals.
- Deal with problems involving several concrete variables in standardized situations.
- While performing the essential functions of this job, the incumbent is regularly required to sit, use hands to finger, handle, or feel objects, to reach with hands and arms, and speak and hear.
- Lift and carry, push and/or pull, or move items weighing up to 20 pounds.

Working Conditions:

- Work is performed in a normal office environment with little exposure to outdoor temperatures or dirt and dust.
- The incumbent's working conditions are typically moderately quiet, but may be loud at times and at some locations.

This class specification should not be interpreted as all-inclusive. It is intended to identify the essential functions and requirements of this job. Incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this specification. Any essential function or requirement of this class will be evaluated as necessary should an incumbent/applicant be unable to perform the function or requirement due to a disability as defined by the Americans with Disabilities Act (ADA). Reasonable accommodation for the specific disability will be made for the incumbent/applicant when possible.



HUMAN RESOURCES – MENDOCINO COUNTY

DATE: April 13, 2017

TO: Civil Service Commission

FROM: Juanie Cranmer, Human Resources Manager

SUBJECT: Public Defender's Office Classification Study – Legal Secretary II

BACKGROUND & ANALYSIS

The Public Defender (PD) submitted a request for a classification study of Legal Secretary II incumbent Laura Hegenbart. Ms. Hegenbart completed a Position Description Questionnaire (PDQ) and HR staff conducted the study.

The concern of the PD is that the duties assigned to Ms. Hegenbart based on her training and possession of Paralegal Certificate are more indicative of the duties of Legal Assistant and are outside the scope of the duties of Legal Secretary II. Although Legal Secretaries and Legal Assistants both perform clerical tasks in support of attorneys, the Legal Assistant is distinguished from Legal Secretary by the performance of paraprofessional duties requiring a Paralegal Certification.

During the study it was found that while many of Ms. Hegenbart duties are consistent with that of Legal Secretary such as providing clerical support to attorneys, processing legal discovery, and preparing legal documents; her duties also include providing paraprofessional support to attorneys such as legal research and assisting with litigation preparation. These duties are consistent with Legal Assistant, requiring possession of paralegal certification.

RECOMMENDATION

It is recommended that the Commission authorize the reclassification of current Legal Secretary II, Laura Hegenbart, to Legal Assistant.

**MENDOCINO COUNTY GOVERNMENT
CLASS SPECIFICATION**

CLASS TITLE: LEGAL ASSISTANT
DEPARTMENT: VARIOUS
REPORTS TO: VARIOUS
CIVIL SERVICE: YES

CLASS CODE: 0076
FLSA STATUS: N
DATE: 09/04 Rev. 2/07
BARGAINING UNIT: SEIU

JOB SUMMARY:

Under general direction, performs paraprofessional work functions in support of staff attorneys including: providing legal research, managing case files; assisting in litigation preparation; initiating, processing and recording various complex legal reports and orders; and performing other administrative functions.

DISTINGUISHING CHARACTERISTICS:

The Legal Assistant class is distinguished from the Legal Secretary series in that the latter is used primarily for the provision of legal secretarial support, whereas the Legal Assistant provides paraprofessional support to attorneys such as legal research and assisting in litigation preparation. In addition, Legal Assistant requires possession of a Paralegal Certificate.

SUPERVISION EXERCISED:

Legal Assistant may provide technical lead to Legal Secretaries and other clerical staff but does not exercise direct supervision.

EXAMPLES OF DUTIES: *Duties may include but are not limited to the following:*

- Conducts legal research, including: reviewing legal opinions and court rulings; searching legislative history; investigating facts; and analyzing cases for appealable issues; summarizing depositions, medical records and other discovery.
- Drafts and prepares various complex legal documents such as: appeal briefs, chronologies from deposition testimony, summarizing of transcripts, interrogatories, summons, complaints, deposition notices, documents for litigation, requests for production, deposition notices, subpoenas, warrants, petitions, declarations, etc.; monitors documents through process, obtains signatures, files with court and/or distributes to parties.
- Contacts various agencies and organizations regarding releases of liens, case settlements, etc.
- Collects and maintains data for grants and other programs; generates reports and processes other related information.
- Logs reports from law enforcement agencies; enters information into the computer; searches for prior offenses; organizes information; forwards information to appropriate parties; and follows up, as needed.
- Receives, assembles and maintains files and other information related to court actions; updates computer information; maintains court calendars by scheduling and reviewing court dates; and files or forwards information, to include: copying reports; requesting needed information; calculating costs; balancing money and receipts; and documenting all actions.
- Transcribes legal documents from written and tape-recorded sources and copies, distributes and/or files same.
- Answers various inquiries; explains policies and procedures; arranges appointments; and processes routine matters independently.
- Provides reference service to other departments.
- May serve as backup for other positions within the department.
- Performs other related duties as assigned.

MATERIAL AND EQUIPMENT USED:

Personal Computer and/or Terminal	Typewriter	General Office Equipment
Video/Audio Copier	Cassette Duplicator	Transcription Equipment
Microfiche Machine	CLETS	
West Law/Lexis		

MINIMUM QUALIFICATIONS REQUIRED:

Education and Experience:

Associate's degree or equivalent from a two-year college; AND three years of experience performing general office duties in

a legal office environment that included typing, filing, and transcribing information; or, an equivalent combination of training and education.

Licenses and Certifications:

Paralegal Certificate

KNOWLEDGE, SKILLS, AND ABILITIES:

Knowledge of:

- Various legal documents and terminology.
- State and federal civil procedures, court rules and litigation process.
- Applicable state, federal and local ordinances, laws, rules and regulations.
- Correct English usage, including spelling, grammar, punctuation, and vocabulary.
- Standard business arithmetic, including percentages and decimals.
- Record keeping, report preparation, filing methods and records management techniques.
- Computer applications and hardware related to the performance of the essential functions of the job.
- General office procedures, policies and practices, as well as basic knowledge of computer and other general office equipment.

Skill in:

- Conducting legal research on computer and in law library.
- Analyzing and resolving administrative situations and problems.
- Using tact, discretion, initiative and independent judgment within established guidelines.
- Typing from rough draft or printed text at a speed sufficient to perform the duties of the job.
- Using a computer to accurately and rapidly enter and retrieve data and information.
- Communicating clearly and effectively, both orally and in writing with internal staff, citizens, and other departmental staff in order to give and receive information in a courteous manner.
- Operating and performing routine maintenance of general office machines.

Mental and Physical Abilities:

- Read and interpret documents such as safety rules, operation and maintenance instructions, procedure manuals, etc.
- Draft legal documents from tapes and handwritten information and type correspondence.
- Understand and carry out written and oral instructions, giving close attention to detail and accuracy.
- Establish and maintain effective working relationships with others.
- Add, subtract, multiply and divide whole numbers, common fractions and decimals.
- Deal with problems involving several concrete variables in standardized situations.
- While performing the essential functions of this job the employee is regularly required to sit, use hands to finger, handle, or feel, and speak and hear.
- Lift and carry, push and/or pull, or move items weighing up to 40 pounds.

Working Conditions:

- Work is performed in a normal office environment with little exposure to outdoor temperatures or dirt and dust.
- The incumbent's working conditions are typically moderately quiet, but may be loud at times and at some locations.

This class specification should not be interpreted as all-inclusive. It is intended to identify the essential functions and requirements of this job. Incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this specification. Any essential function or requirement of this class will be evaluated as necessary should an incumbent/applicant be unable to perform the function or requirement due to a disability as defined by the Americans with Disabilities Act (ADA). Reasonable accommodation for the specific disability will be made for the incumbent/applicant when possible.

**MENDOCINO COUNTY GOVERNMENT
CLASS SPECIFICATION**

CLASS TITLE:	LEGAL SECRETARY I	CODE:
	LEGAL SECRETARY II	CODE:
DEPARTMENT:	VARIOUS	FLSA STATUS: N
REPORTS TO:	VARIOUS	DATE: 2/07
CIVIL SERVICE:	YES	BARGAINING UNIT: SEIU or CONFIDENTIAL

JOB SUMMARY:

Under direct supervision at the I (entry level) and general supervision at the II (journey level), provides specialized, confidential and diversified clerical support in a legal setting; and maintains schedules, handles office details and relieves staff (legal or otherwise) of procedural details.

DISTINGUISHING CHARACTERISTICS:

The Legal Secretary series is distinguished from other clerical classifications by its performance of duties of a legal nature such as preparing legal documents, and/or providing clerical support to staff attorneys. The Legal Secretary series is distinguished from Supervising Legal Secretary by the latter's responsibility for providing first line supervision. The Legal Secretary series is distinguished from Legal Assistant by the latter's performance of paraprofessional work functions in support of staff attorneys including: providing legal research, assisting in litigation preparation; initiating, processing and recording various complex legal reports and orders, and the requirement that Legal Assistant possess Paralegal Certification.

Legal Secretary I

Under direct supervision, Legal Secretary I is the entry level in the Legal Secretary series. Employees in this class receive training, are given detailed instructions in the performance of routine tasks and perform tasks that are more structured and repetitive than those assigned at the II level. As requisite skills and knowledge are developed, greater independence and the full scope of responsibility are exercised. Most incumbents are expected to promote to the journey level within one to two years of successful performance; however, positions that are limited to duties of a more routine, repetitive nature may be permanently allocated at the I level.

Legal Secretary II

Working under general supervision, Legal Secretary II is the journey level in the Legal Secretary series. Employees at this level are expected to have related background and experience and to be qualified to perform the full scope of duties; using independent judgment in selecting and applying specific references, procedures, sequences and alternatives to different work situations. Positions in this class are flexibly staffed from the lower level or Legal Secretary I, or if filled from the outside, require prior related experience.

SUPERVISION EXERCISED

Legal Secretary I/II does not exercise supervision.

EXAMPLES OF DUTIES: *Duties may include but are not limited to the following:*

- Participates in the efficient operation of the assigned area by performing a wide variety of legal secretarial and support duties in order to relieve the attorneys and staff of a variety of procedural details.
- Initiates, updates and maintains case files by creating physical and computerized files on new cases and receiving, assembling, sorting categorizing and storing subsequent, case-related materials either physically in a file or on computer database to ensure that information is current and accessible.
- Prepares legal documents, including subpoenas, warrants, petitions, briefs, motions, citations, pleadings and others by typing from transcription, audio tapes, rough draft, oral instruction, dictation or clear copy; reviews drafts for punctuation, spelling and grammar and makes corrections to drafts in order to produce final copies of professional work product.
- Coordinates activities in the area of assignment by maintaining calendars, scheduling attorney/client meetings or meetings between staff and other groups or organizations, arranging for necessary materials to be available at meetings and arranging business travel for management and professional staff to ensure smooth, efficient operations.
- Receives and/or requests discovery and processes information by copying reports, police tapes, photos, etc., requesting further needed information and documenting all actions in order to assist attorneys in case preparation.
- Logs reports from various agencies by entering information into the computer; searches for prior offenses; organizes

information; forwards information to appropriate parties and follows up, as needed.

- Composes and types letters, memoranda and basic reports, utilizing word processing software; reviews drafts for punctuation, spelling and grammar and suggests/makes corrections to drafts; arranges for, or copies, distributes and files same to ensure smooth, efficient operations.
- Organizes and carries out secretarial/support assignments; researches, compiles and organizes information and data from various sources on a variety of specialized topics related to assigned area; assists in a variety of division operations; performs special projects and assignments as requested.
- Serves as initial contact/resource person for the area of assignment by screening calls, visitors and mail; responds to complaints and requests for information and assistance from the public, County staff and others by interpreting/explaining regulations, procedures, policies, systems, rules; researches and gathers information to provide accurate answers and information; refers more technical questions or issues to appropriate legal staff; ensures follow up to unanswered inquiries.
- Operates a variety of modern office equipment including copiers, computers and related software, word processors, tape recorders, duplicators and printers.
- At the journey level, may train other staff.
- Performs other related duties as assigned.

MATERIAL AND EQUIPMENT USED:

Personal Computer and/or Terminal
Paging System
Microfiche Machine

Typewriter
Cassette Duplicator
Scanner

General Office Equipment
Transcription Equipment
CLETS System

MINIMUM QUALIFICATIONS REQUIRED:

Education and Experience:

Legal Secretary I

Graduation from high school or G.E.D. equivalent; AND, two years of full-time experience providing clerical and secretarial support involving typing, filing, calendar coordination, public contact, and project coordination tasks. Legal experience is desired.

Legal Secretary II

Graduation from high school or G.E.D. equivalent; AND, two years of full-time experience providing legal secretarial support involving typing and preparation of legal documents, processing and filing legal documents, calendar coordination and project coordination tasks; OR one year full-time experience comparable to a Legal Secretary I with Mendocino County; or an equivalent combination of training and education.

Licenses and Certifications:

None

KNOWLEDGE, SKILLS, AND ABILITIES:

Legal Secretary I

Knowledge of:

- Modern office procedures, methods and equipment including computer equipment, word processing methods, techniques and programs.
- Principles of business letter writing, including English usage, spelling, vocabulary, grammar and punctuation.
- Record keeping, filing methods and records management techniques.
- General office procedures, policies and practices, as well as knowledge of computer application, hardware, and other general office equipment related to the performance of the essential functions of the job.
- Computer applications and hardware related to performance of the essential functions of the job.

Skill in:

- Typing and entering data from rough draft or printed text using a word processor or typewriter at a speed necessary for successful job performance.
- Composing clear and concise correspondence, reports and other written materials.
- Scheduling and coordinating projects; setting priorities; adapting to changing priorities.
- Exercising good judgment, applying logical thinking and making sound decisions to accomplish tasks or solve

- problems.
- Operating modern office equipment including computer equipment and software programs.
- Interpreting and applying policies, procedures, statutes and local rules, codes and regulations pertaining to assigned programs and functions.
- Collecting, compiling and filing information and data.
- Operating and performing routine maintenance of general office machines.

Mental and Physical Ability to:

- Communicate clearly and concisely, both orally and in writing.
- Understand and carry out oral and written instructions.
- Respond to questions from the public and County personnel regarding policies and procedures for the assigned area.
- Establish and maintain effective working relationships with those contacted in the course of work.
- While performing the essential functions of this job the employee is regularly required to sit, use hands to finger, handle, or feel, and speak and hear.
- Lift and carry, push and/or pull, or move items weighing up to 20 pounds.

Legal Secretary II—(in addition to the qualifications for Legal Secretary I)

Knowledge of:

- Legal terminology and legal documents commonly used in the area of assignment.
- Applicable state, federal and local statutes, laws, rules and regulations that apply to the area of assignment.

Skill in:

- Drafting legal documents from tapes and handwritten information and type correspondence.
- Using tact, discretion, initiative and independent judgment within established guidelines.
- Organizing work, setting priorities, meeting critical deadlines and following up on assignments with a minimum of direction.
- Communicating to others the policies, procedures, statutes, local rules, codes and regulations pertaining to assigned programs and functions.

Working Conditions:

- Work is performed in a normal office environment with little exposure to outdoor temperatures or dirt and dust.
- The incumbent's working conditions are typically moderately quiet, but may be loud at times and at some locations.

This class specification should not be interpreted as all-inclusive. It is intended to identify the essential functions and requirements of this job. Incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this specification. Any essential function or requirement of this class will be evaluated as necessary should an incumbent/applicant be unable to perform the function or requirement due to a disability as defined by the Americans with Disabilities Act (ADA). Reasonable accommodation for the specific disability will be made for the incumbent/applicant when possible.