

LEGAL SECRETARY - CONFIDENTIAL

Definition:

Assists legal staff by performing a variety of highly specialized secretarial, technical, and administrative support duties, including (but not limited to) taking and transcribing of complex, specialized, or highly technical legal dictation, preparing correspondence, greeting visitors, and maintaining up-to-date files and libraries, basic research, and record keeping. May coordinate the flow of information among work teams, distribute work to other support staff, and assist staff engaged in litigation.

Distinguishing Characteristics:

This position represents a senior-level Legal Secretary. Advancement to Legal Secretary requires demonstrating the following skills and abilities: highly advanced keyboarding skills (70 wpm) working knowledge of legal terminology; ability to produce original formats and documents in word processing software; the ability to conduct basic legal research; the ability to calendar filing deadlines and other case dates; and the ability to maintain up-to-date and organized legal case files.

Supervision Exercised and Received:

Serves under limited supervision from the General Counsel, designee or Senior Associate General Counsel. May give instructions to clerical staff.

Examples of Duties and Responsibilities:

Duties and responsibilities may include, but are not limited to, the following:

- Provides a full scope of senior-level secretarial services, often of a confidential or sensitive nature to the legal department having considerable dealings with customers within and outside SCOE, both as individuals and groups.
- Composes correspondence and other documents of an important and often confidential nature from dictation, brief instructions, notes, or personal knowledge and research. May require the selection and use of formats found in the legal profession. Verifies and corrects grammar and composition as required.
- Interviews persons to compile often confidential information for legal and administrative records and reports, requiring skill in questioning and prompting the delivery of difficult and sensitive explanations.
- Maintains budget records, billing systems and files. Prepares and inputs accounting forms, such as attorney expense reports, purchase orders, warehouse requests, budget and staffing requests. Receives and processes accounts payable, receives periodic printouts of financial activity and prepares summary reports. Assists in the budget development process by gathering and compiling required information.
- Indexes and files correspondence, emails, reports, and other hard copy and electronic materials according to a prescribed breakdown. Independently classifies material when proper classification is not specified in advance.
- Searches information from files, records, and libraries, compiling and preparing summary reports. May involve statistical calculations, checking, balancing, and other related presentation formats.
- Prepares materials for attorney presentations and workshops. Coordinates workshops including making conference room reservations, preparing materials and supplies, and obtaining refreshments for attendees. Coordinates attorney travel arrangements, including making hotel reservations, picking up and returning rental cars, and ensuring the office vehicles are maintained.
- Completes data entry in an accurate and timely manner.
- Enters attorney time reports into the billing system, proofreads reports, and finalizes reports after attorney review.
- Proofreads and corrects letters, correspondence, briefs, reports, and other documents to conform with standards of English grammar and composition, and business and legal standards and formats.
- Maintains attorney calendars, including deadlines, hearing dates, and other important dates, in accordance with the attorney's preferences. Track deadlines and consult with the attorney as necessary to ensure deadlines are met.
- Maintains case files and other project files, both electronic and hard copy, in an organized and timely manner.

- Maintains files and prepares documents relating to collective bargaining negotiations, employee grievances, and other matters of employer-employee relations.
- Maintains committee records, assists in the preparation of departmental reports by gathering and summarizing information from a variety of sources. Committee proceedings may cover sensitive and confidential information requiring careful handling of written proceedings.
- Screens incoming calls, mail, and visitors in a professional and courteous manner, evaluating the relative importance of each and independently resolving routine matters or referring to others.
- Attends non-routine, often confidential, meetings to record significant elements of discussion and record official action verbatim. Prepares files, greets attendees, and initiates follow through communications.
- May maintain certain fiscal records for the department budget, fund or case account, preparing and distributing invoices, requisitions, expense claims and vouchers.
- May monitor progress of claims and cases, noting and focusing on critical dates, notifying others of required communications, and working with other departments and staff for testimony and response.
- Regularly has access to and may gather confidential information relating to collective bargaining negotiations, grievances, and other matters of employer-employee relations.
- Performs administrative duties and coordinates for special projects or events involving multiple locations.
- May oversee the work of lower level secretarial and clerical team members.
- Performs other duties as required to accomplish the objectives of the position.

Employment Standards:

Knowledge of:

- Considerable knowledge of modern legal secretarial and legal office principles, organization, practices, and methods.
- In-depth knowledge of the special practices, technicalities, formats, and work methods for a legal department.
- Considerable knowledge of English grammar and composition, business and legal formats, spelling, proofreading, filing, and record keeping.
- In-depth human relation skills to communicate technical and highly confidential information, to employ specific lines of inquiry, and to maintain harmony in a work setting.
- Considerable knowledge of interviewing techniques.
- Math skills sufficient to compute sums, quotients, fractions, percentages, and ratios.
- Safe work practices.

Ability to:

- Perform all of the relevant duties of the position with only limited supervision.
- Initiate, develop, and maintain office information systems.
- Keyboard to format and compose original correspondence onto specialized formats at a rate of 70 w.p.m.
- Conduct research from various sources, to perform basic mathematical operations; and to prepare legal correspondence and briefs.
- Originate, organize, and maintain legal case files.
- Operate a personal computer, printers, specialized database software, and voice recording devices.
- Analyze technical, complex and sensitive problems and to develop and apply appropriate solutions.
- Read, understand and apply information from labor contracts, legal materials, and state, federal, and local laws, regulations, policies, and procedures.
- Understand statutes, court decisions, ordinances, resolutions, and legal documents.
- Write correspondence on complex and sensitive matters in a professional manner.
- Maintain confidential and sensitive information.
- Prioritize work in order to meet multiple deadlines and conflicting schedules and maintain calendars.
- Work in a fast-paced environment with continually changing priorities.
- Support multiple attorneys simultaneously on different types of projects.
- Remain calm in stressful situations.

- Work effectively as part of a team devoted to customer service both within the office and externally for clients and others.

Computer Skills:

- Intermediate word processing skills, such as the ability to format, save files for cross- platform use and in different versions, compare versions of documents, work with toolbars, menus, and rulers, insert graphics, use borders, create forms and templates, adjust formatting, and print labels and envelopes.
- Intermediate database skills, such as the ability to sort and retrieve records; create layouts, reports, create and print mailing labels; perform mail merge for form letters; add, edit, delete fields and records.
- Intermediate spreadsheet skills, including the ability to open, modify, save, and print a new or existing spreadsheet, and enter text and numbers.
- Intermediate email skills, including the ability to send and open a file attachment, search emails, create email address lists and groups, archive emails in an organized manner, and retrieve sent and received emails as necessary.
- Intermediate Internet usage including the ability to use browsers to view web pages, use a search engine, bookmark a site, download a file; print out web pages, copy text, edit bookmarks, print web pages, and observe copyright regulations.
- Advanced electronic presentation software such as the ability to create a slide show, add new slides, change the template design, use transitions and other effects, create handouts, insert sounds and animation, set up and run a presentation from an LCD display or projector.

Education and Experience:

Any combination of education and experience that would likely provide the knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Education:

- Requires completion of High School and one year of business school.

Experience:

- Requires four years of progressively responsible secretarial experience.
- Additional relevant experience in a legal setting may be substituted for formal education.

Physical Demands:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

- The position requires ordinary ambulatory ability to retrieve work materials, intermittent walking, standing, stooping, and carrying and lifting of light-to-medium weight materials such as case files, law books, and similar materials (under 30 pounds).
- Requires visual acuity sufficient to recognize people, words, and numbers.
- Requires hand-eye-arm and finger dexterity to use a personal computer keyboard, ten- key, and other common office equipment.
- Requires speaking and hearing ability sufficient to hear over phone and carry on complex, technical, sensitive, and confidential conversations.
- Must have normal vision (20/20), corrected or uncorrected.

Work Environment:

The following conditions may be present:

- Work is performed in an office environment with minimal exposure to health and safety considerations.

Other Requirements:

- Must be fingerprinted and a satisfactory Department of Justice records check must be received by SCOE, prior to employment.
- TB testing will be required upon employment.
- Must pass a pre-employment physical (if applicable).
- May be required to obtain first aid and CPR certificates within the first 6-12 months of employment.
- May be required to drive with or without students; some positions may require a current California driver license, proof of insurance, and possible participation in the DMV Pull Notice Program once employed.