

**POSITION DUTY STATEMENT**

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE <b>LEGAL SUPPORT SUPERVISOR I</b>	OFFICE/BRANCH/SECTION <b>42-LEGAL-SACRAMENTO</b>	
WORKING TITLE <b>LEGAL SUPPORT SUPERVISOR</b>	POSITION NUMBER <b>701-001-1277-XXX</b>	EFFECTIVE DATE <b>5/2015</b>

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

**GENERAL STATEMENT:**

Under general direction of management the incumbent is responsible for providing litigation support services through the direct supervision of the legal support team (secretarial, administrative and/or other clerical support staff).

**TYPICAL DUTIES:**

Percentage Essential (E)/Marginal (M) <sup>1</sup>	Job Description
65% E	Train the legal support team on office procedures regarding correspondence and memorandums. Review documents including correspondence and memorandums to ensure accuracy and completeness in accordance with office procedures. Train the legal support team on legal requirements [California Code Civil Procedure, California Rules of Court, Local Rules, and other reference material] of legal documents [pleadings, briefs, declarations, proofs of service, etc.]. Review legal documents to determine compliance with legal requirements. Proofread all work product to check for typing, spelling, grammar and punctuation. Train the legal support team on office procedures regarding the location, content and completeness of files. Monitor and evaluate the location, content and completeness of files in accordance with office procedures. Train the legal support team on office procedures regarding of files when opening and/or closing cases. Monitor and evaluate the content and completeness of files when opening and/or closing cases in accordance with office procedures. Train the legal support team on office procedures regarding the location, content and completeness of electronic files. Monitor and evaluate the location, content and completeness of electronic files. Train the legal support team to complete travel expense claims, travel advances and reservations for attorneys. Monitor and evaluate compliance with the rules of travel regarding travel expense claims, travel advances and reservations. Train the legal support team accounting processes regarding billings and invoices for services provided by vendors. Monitor and evaluate compliance with the rules of accounting regarding billings and invoices for services provided by vendors. Special Requirement: Proficient in Microsoft Office 2013 and Adobe Pro and gain proficiency in Houdini, CA Jury Selector and Legal Solutions. Train the legal support team on office procedures regarding the location, content and completeness of information in Houdini, CA Jury Selector and Legal Solutions. Monitor and evaluate the content and completeness of Houdini, CA Jury Selector and Legal Solutions information in accordance with office procedures.
20% E	Calculate and track workload using various methods to ensure the legal support team meets deadlines. Suggest new concepts to provide more efficient services from the legal support team. Monitor the status of the legal support team operations to keep the Deputy Chief Counsel and other management apprised of goals and objectives being met. Identify training needs of the legal support team for further development of legal support skills. Evaluate workload to determine the necessity for overtime, staffing allocations and/or workload changes. Assist in the recruitment and selection process of candidates for the legal support team. Enforce consistent performance standards and expectations for the legal support team in accordance with Caltrans policies. Evaluate employee (legal support team) performance and recommend appropriate action. Determine the need for appropriate disciplinary action (progressive discipline) to correct

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performance issues and foster a productive workplace. Oversee issue resolution to ensure safety of staff. Resolve problems escalated by staff. Oversee the management of assets (computers, equipment, supplies, etc.) and/or purchasing (CalCard) to ensure the policies and procedures are followed. Review and approve time sheets as well as authorize vacation and other absence requests in accordance with Caltrans policies, office procedures, union contracts and needs of the office.

15% M

The Legal Support Supervisor I must be able to perform legal support team work (format, proofread edit and file legal documents and pleadings in multiple jurisdictions in accordance with legal requirements and office procedures)

ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.

MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

### SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

Directly supervises the Legal Support Team.

### KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

Knowledge of: Legal terms and procedures before State and Federal courts as well as administrative agencies. Knowledge of litigations processes including the rules of discovery. It is also highly desirable that: The incumbent has capacity to work in a fast paced environment. The incumbent has excellent oral and written communication skills. The incumbent has strong organizational skills. The incumbent has excellent typing, grammar, spelling and punctuation skills. The incumbent has excellent work habits

Caltrans' organization, mission, policies, and procedures; Legal Division program goals, objectives, and priorities; principles and practices of employee supervision, development, and training; technical legal terms and formatting requirements of legal documents and their processing; understand judicial processes in State, Federal, trial and appellate courts, Office of Administrative Hearings and other venues of arbitration; proper format of state and federal citations; and use of legal resources from traditional library references, software and internet research tools. The incumbent should demonstrate expertise with word processing software such as Word, and have a working knowledge of the Microsoft Office Suite, including Excel, and must understand technical requirements of equipment and their operating systems/requirements. It is also highly desirable that the incumbent has a working knowledge of legal terms, litigation, rules of discovery, including electronic discovery and e-filings.

Ability to: Adjust quickly to multiple priorities and short time frames. Produce a large volume of work. Keep confidential the content of all work performed.

Approach a problem by using a logical, systematic, sequential approach; use technology to simplify and streamline tasks; learn new technology techniques to enhance the job; establish a team environment and assign backup roles; manage, lead and enable the process of change and transition while helping others deal with their effects; listen to others and communicates in an effective manner; ensure that others involved in a project or effort are kept informed about developments and plans; ensure that important information from management is shared with employees and others as appropriate; give and receive constructive feedback; recognize differences of opinion, bring them out into the open for discussion, and look for win-win solutions; use appropriate interpersonal styles and methods to reduce tension or conflict between two or more people/groups; create solutions to problems using novel methods and processes; identify and respond to current and future client needs; provide excellent service to internal and external clients; make critical and timely decisions in difficult or ambiguous situations; take charge of a group when it is necessary to facilitate change, overcome an impasse, face issues, or ensure that decisions are made; delegate responsibility, work with others, and coach them to develop their capabilities; identify the information needed to clarify a situation and drawing out the information when others are reluctant to disclose it; convey confidence in employees' ability to be successful, especially at challenging new tasks; allow employees' freedom to decide how they will accomplish their goals and resolve issues; take responsibility for own work, including problems and issues; anticipate and prevent breaches in confidentiality and/or security; presents arguments that address others' most important concerns and issues and looks for win-win solutions; identify and propose solutions that benefit all parties involved in a situation; provide guidance in how to strengthen knowledge, skills, and competencies to improve personal and organizational performance; communicate effectively and develop employees; develop, maintain, and strengthen relationships with others inside or outside of the organization who can provide information, assistance, and support; ensure the effective, efficient, and sustainable use of public service

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resources and assets; function effectively when under pressure and maintain self-control in the face of hostility or provocation; find creative ways to make people's work rewarding; communicate ideas, thoughts, and facts in writing.

## RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent is responsible for independently carrying out the policies, goals and objectives of the division as they relate to the varied and complex administrative work of the position. Consequences of error in failure to adequately respond or poor decisions may adversely affect the division's ability to accomplish its mission.

The incumbent is generally responsible only for the decisions required to successfully complete job functions as described above; however, errors may affect the ability of the Legal Division to promptly and accurately advise Department personnel at all levels, and inability to adequately represent the Department in court. This could result in loss of millions of dollars, court sanctions, and/or loss of credibility in the courts, with other public agencies and the public.

## PUBLIC AND INTERNAL CONTACTS

The incumbent will work with all levels of staff and management within the division, statewide, and various Headquarters divisions. Employee must maintain cooperative working relationships with office professional and support staff as well as other departmental employees.

## PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Must be able to work under pressure, meet deadlines and maintain a helpful, positive attitude. Must have the ability to work on a keyboard, have manual dexterity, sit for long periods, develop and maintain cooperative relationships, and have the ability to focus for long periods of time.

## WORK ENVIRONMENT

While at their base of operation, employees will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. Overtime may be required, and vacations may be restricted based on personnel coverage and workload needs.

I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

EMPLOYEE (Print)

EMPLOYEE (Signature)

DATE

I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE