



| | | | |
|--|------------------|--|----------------------|
| Classification Title Legal Analyst | | Department Office of the State Public Defender (OSPD) | |
| Working Title Caseworker | | Office/Unit/Section/Geographic Location Appellate Division Sacramento/Oakland | |
| Position Number 426-015-5237-020 | | Name and Effective Date enter text | |
| WWG: 2 | CBID: R01 | Tenure: P | Time Base: FT |

General Statement: Under the general supervision of the Staff Services Manager I and the direct case-related supervision of an OSPD Attorney, the Legal Analyst works collaboratively with a team of attorneys and caseworkers to provide paralegal support in capital appeals and other matters in the California Supreme Court, the District Courts of Appeal, and the Superior Courts of California. The Legal Analyst supports the production of briefs of the highest caliber, develops and files motions under attorney supervision in the Superior Courts of California, maintains the integrity of an intricate document management system, maintains client confidentiality, and sensitively communicates with clients. The Legal Analyst may occasionally travel to superior courts, county public defender offices, and California State Prisons.

Specific Tasks [Essential (E) / Marginal (M) Functions]

40% (E) Pleading Production: Independently researches and applies applicable law and court rules to file and serve pleadings; verifies citations in pleadings for accuracy and compliance with California Style Manual (CSM) or the Bluebook citation style; analyzes pleadings to ensure content accuracy and formatting compliance with applicable laws and court rules; collects, analyzes and indexes case-related information and material; analyzes case material to determine internal deadlines and filing dates, and utilizes an effective calendaring system to coordinate and track deadlines and filing dates. Utilizes word processing software to produce pleadings, which may include tables of contents, tables of authorities, appendices, and exhibits.

40% (E) Legal Research and Case Management: Independently gathers, analyzes and annotates case transcripts; collects, analyzes, and indexes voluminous case-related information and materials, including court files and exhibits; summarizes and analyzes the record on appeal; creates systems for analyzing, gathering and tracking litigation information and documents; enters data into computer databases and organizes the data.

Conducts appropriate legal and topic-specific research, utilizing print and digital resources, to respond to defined legal questions identified by an attorney; prepares draft documents including professional correspondence and substantive motions; analyzes testimony and other documents to produce summaries and memoranda; analyzes case file material to identify materials potentially relevant to habeas corpus proceedings. Analyzes case material and legal research to draft memorandums for case team review; supports oral argument preparation for attorneys.

Analyzes case file material to determine relevant records to be acquired; analytically and methodically utilizes databases to locate witnesses and interviews witnesses; accurately drafts declarations and ensures compliance with applicable laws and courts rules; prepares expert witnesses; researches and analyzes clients' social history to create and maintain life chronology documents.

- 10% (E) Client Support: Facilitates attorney/client legal visits and confidential legal calls; conducts policy and regulations research; collects and analyzes information, records, and resources concerning clients' custody and health-related issues to recommend solutions; visits, corresponds, and communicates with clients under the assigned attorney's supervision.
- 5% (E) Participates in working group meetings according to assigned areas of law and/or client issues. Attends and participates in monthly legal analyst meetings. Assists Senior Legal Analyst with the presentation of training sessions for the unit.
- 5% Other job-related duties and tasks as assigned.

Supervision Received

Reports directly to the Caseworker Supervisor (Staff Services Manager I). However, direction and assignments come from staff attorneys and may also come from a Senior Legal Analyst.

Supervision Exercised

None.

Administrative Responsibility

None.

Personal Contacts

Continuous contact with OSPD attorneys, management staff, and other OSPD employees, and regular contact with clients (generally housed in a California State Prison), clerks of various county courts and the California Supreme Court, employees at prison institutions where OSPD clients are housed, and other government agencies. May also include personal contact with witnesses and out-of-state public and government agencies.

Actions and Consequences

Failure to adequately perform these duties could undermine OSPD's mission to provide high-quality representation to its clients.

Functional Requirements

This position is eligible for remote-centric telework, which includes a minimum of three remote workdays per week, but team coordination may require in-office work as needed and occasional travel. During onboarding and training, this position will require the incumbent to report to one of the OSPD's offices daily. Business travel reimbursements consider an employee's designated Headquarters Location and primary residence. The policy may be subject to change by the California Department of Human Resources. All commute expenses to the headquartered location will be the responsibility of the incumbent. When in office, the incumbent utilizes typical office equipment such as, but not limited to, telecommunications

equipment, computers, and photocopiers/scanners. Occasional transport of small office equipment.

Desired Qualifications

- Knowledge of legal research platforms, including Westlaw and Forecite.
- Ability to use computer programs and legal research platforms in an efficient and effective manner.
- Knowledge of computer programs such as MS Office 365 Suite (i.e., Word, PowerPoint, OneDrive, Outlook, SharePoint, Teams, and Excel), Zoom, FileMaker Pro, Adobe, and WordPerfect.
- Knowledge of California Style Manual, The Bluebook, California criminal law practice and procedure, California appellate practice and procedure, California Rules of Court, and the Rules of the Supreme Court of the United States.
- Ability to meet scheduled and last-minute deadlines.
- Ability to work in a traditional office and virtual team environment.
- Ability to communicate, solve problems, and manage time effectively.
- Ability to adapt to unpredictable changes in case priorities and assignments.
- Ability to utilize the California Style Manual and/or the Bluebook to correctly format citations in legal writing.
- Ability to develop and maintain good working relations with all levels of staff and with external agencies or court representatives.
- Ability to maintain confidentiality of privileged information in compliance with applicable laws.
- Ability to learn and use technology to support paralegal-related tasks, including the use of databases and electronic court filing systems.

Special Personal Requirements:

- Strong analytical, communication, and organizational skills.
- Willingness to attend OSPD-provided training related to post-conviction appellate representation, and technical skills to support the work (e.g., SharePoint, Word, Cal Style Manual, etc.)

Special Requirements

- The incumbent is expected to always maintain confidentiality due to the access to sensitive information and the nature of the work performed.
- The position requires traveling to clients, conferences, meetings, and training events up to 10% of the time and includes occasional overnight travel, up to a week. Travel is primarily by automobile but also includes occasional train, airplane, or public transportation.

I have read and understand the duties listed above, and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the supervisor).

Printed Name

Employee Signature

Date

I certify that this duty statement represents the current and accurate description of the essential functions of this position. I have discussed the duties of this position with and have provided a copy

of this duty statement to the employee named above.

Printed Name

Supervisor Signature

Date



Office of the State Public Defender
Position Duty Statement
HR- 1820 (07/2025)

Proposed

| | | | |
|--|------------------|--|----------------------|
| Classification Title Legal Assistant | | Department Office of the State Public Defender (OSPD) | |
| Working Title Assistant Caseworker | | Office/Unit/Section/Geographic Location Sacramento/Oakland | |
| Position Number 426-015-1820-XXX | | Name and Effective Date enter text | |
| WWG: 2 | CBID: R01 | Tenure: P | Time Base: FT |

General Statement: Under the general supervision of the Staff Services Manager I and the direct case-related supervision of an OSPD Attorney, the Legal Assistant works collaboratively with a team of attorneys and caseworkers to provide paralegal support in capital appeals and other matters in the California Supreme Court, the District Courts of Appeal, and the Superior Courts of California. The Legal Assistant supports the production and filing of pleadings under attorney supervision, maintains client confidentiality, and maintains the integrity of an intricate document management system. The Legal Assistant may occasionally travel to superior courts, county public defender offices, and California State Prisons.

Specific Tasks [Essential (E) / Marginal (M) Functions]

- 45% (E) Pleading Production: Assists Senior Legal Analysts with filing and serving pleadings in compliance with applicable law and court rules; verifying citation style in pleadings for accuracy and compliance with California Style Manual (CSM) or the Bluebook citation style; preparation of initial draft pleadings by utilizing templates; creating tables of contents, tables of authorities, appendices, and exhibits; managing shifting priorities by maintaining an effective calendaring system to coordinate and track internal deadlines and court filing dates.
- 30% (E) Legal Research and Case Management: Assists Senior Legal Analysts with maintaining electronic and hard copy case files; gathering and organizing case transcripts; collecting and indexing voluminous case-related information and materials, including court files and exhibits; acquiring and storing litigation information and documents; and entering and organizing data in computer databases.

Assists Senior Legal Analysts with organizing and reviewing the record on appeal; legal research, utilizing print and digital resources, and locating information to be used in drafting documents, including professional correspondence and substantive motions. Assists Senior Legal Analyst with compiling testimony and other documents to be used to produce summaries and memoranda; compiling and organizing case file material to assist Senior Legal Analysts with identifying materials potentially relevant to habeas corpus proceedings. Collaborates with Senior Legal Analyst to support oral argument preparation. Assists with researching and requesting records relevant clients' social history to assist Senior Legal Analysts with creating and maintaining life chronology documents. Assists with utilizing databases to locate witnesses; assists with collecting relevant information to be used to draft declarations in compliance with applicable laws and courts rules; assists with collecting and organizing relevant materials to be used to prepare expert witnesses.

- 15% (E) Client Support: Assists Senior Legal Analysts with arranging attorney/client legal visits, confidential legal calls, and client legal supply requests; collecting, organizing, and reviewing records and resources concerning clients' institutional and health-related issues; routing and storing client correspondence and fielding client information requests.
- 5% (E) Participates in working group meetings. Attends and participates in monthly department meetings. Assists Senior Legal Analysts with the preparation and presentation of training sessions for the unit.
- 5% Other job-related duties and tasks as assigned.

Supervision Received

Reports directly to the Caseworker Supervisor (Staff Services Manager I). However, direction and assignments come from staff attorneys and may also come from a Senior Legal Analyst.

Supervision Exercised

None.

Administrative Responsibility

None.

Personal Contacts

Continuous contact with OSPD attorneys, management staff, and other OSPD employees, and regular contact with clients (generally housed within a California State Prison), clerks of various county courts and the California Supreme Court, employees at prison institutions where OSPD clients are housed, and other government agencies. May also include personal contact with witnesses and out-of-state public and government agencies.

Actions and Consequences

Failure to adequately perform these duties could undermine OSPD's mission to provide high-quality representation to its clients.

Functional Requirements

This position is eligible for remote-centric telework, which includes a minimum of three remote workdays per week, but team coordination may require in-office work as needed and occasional travel. During onboarding and training, this position will require the incumbent to report to one of the OSPD's offices daily. Business travel reimbursements consider an employee's designated Headquarters Location and primary residence. The policy may be subject to change by the California Department of Human Resources. All commute expenses to the headquartered location will be the responsibility of the incumbent. When in office, the incumbent utilizes typical office equipment such as, but not limited to, telecommunications equipment, computers, and photocopiers/scanners. Occasional transport of small office equipment.

Desired Qualifications

- Ability to use computer programs and legal research platforms in an efficient and effective manner.
- Knowledge of computer programs such as MS Office 365 Suite (i.e., Word, PowerPoint, OneDrive, Outlook, SharePoint, Teams, and Excel), Zoom, FileMaker Pro, Adobe, and WordPerfect.

- Interest and ability to learn and apply the California Style Manual and The Bluebook to correctly style citations in legal writing;
- Interest and ability to learn California criminal law practice and procedure, California appellate practice and procedure, California Rules of Court, and the Rules of the Supreme Court of the United States.
- Ability to meet scheduled and last-minute deadlines.
- Ability to work in a traditional office and virtual team environment.
- Ability to communicate, solve problems, and manage time effectively.
- Ability to adapt to unpredictable changes in case priorities and assignments.
- Ability to develop and maintain good working relations with all levels of staff and with external agencies or court representatives.
- Ability to maintain confidentiality of privileged information in compliance with applicable laws.
- Ability to learn and use technology to support paralegal-related tasks, including the use of databases and electronic court filing systems.

Special Personal Requirements:

- Strong analytical, communication, and organizational skills.
- Willingness to attend OSPD-provided training related to post-conviction appellate representation, and technical skills to support the work (e.g., SharePoint, Word, Cal Style Manual, etc.)

Special Requirements

- The incumbent is expected to always maintain confidentiality due to the access to sensitive information and the nature of the work performed.
- The position requires traveling to clients, conferences, meetings, and training events up to 10% of the time and includes occasional overnight travel, up to a week. Travel is primarily by automobile but also includes occasional train, airplane, or public transportation.

I have read and understand the duties listed above, and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the supervisor).

Printed Name

Employee Signature

Date

I certify that this duty statement represents the current and accurate description of the essential functions of this position. I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Printed Name

Supervisor Signature

Date