STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Legal Secretary	42-LEGAL-FRESNO	
WORKING TITLE	POSITION NUMBER	REVISION DATE
LEGAL SECRETARY	701-005-1282-XXX	05/22/2025

As a valued member of the Caltrans team, you make it possible to improve lives and communities through transportation.

GENERAL STATEMENT:

Under the general supervision of a Supervisor I, the Legal Secretary will provide secretarial support in a fast-paced legal office of the Legal Division, which consists of litigation and house counsel/transactional attorneys, investigators, paralegals, and administrative staff in the following major specialties of law; Tort, Construction Arbitration, Environmental, Contracts, Employment, Real Property, Inverse Condemnation, legal opinions, and administrative matters. Traditionally each Legal Secretary is assigned to three or more attorneys, but may provide clerical support and assistance to other profession staff. Legal Secretaries are assigned to a team for back-up purposes and assistance with overflow work. Incumbent must possess a valid typing certification of 45 WPM.

CORE COMPETENCIES:

As a Legal Secretary, the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)
- **Reliability:** Ability to demonstrate dependability in meeting commitments, and providing a consistent work product. Takes responsibility for individual actions in order to meet deadline demands. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)
- **Problem-solving and Decision-making :** Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)
- **Interpersonal Effectiveness :** Effectively and appropriately interacts and communicates with others to build positive, constructive, professional relationships. Tailors communication style based on the audience. Provides and is receptive to feedback. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)
- **Planning and Results Oriented:** Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)
- **Thoroughness:** Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Employee Excellence - Collaboration, Equity, Innovation, Integrity, Pride)

TYPICAL DUTIES:

Percentage Essential (E)/Marginal (M)[1]	Job Description

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60%	E	Perform complex legal secretarial work including the preparation, processing, filing and service of a large variety of legal documents in multiple jurisdictions, i.e. municipal, superior, state, federal and appellate courts or the Office of Administrative Hearings; prepare, compose and proofread correspondence independently; accurately transcribe difficult dictation involving a variety of legal terms from a machine or handwritten documents, as well as format computer-generated documents from various forms of electronic media and file types; check and confirm citations and quotations from reference books or electronic research tools; generate tables of authorities and tables of contents.
20%	E	Maintain calendar of court and response dates; maintain case files to include organizing and indexing pleadings, correspondence, invoices, case contacts, etc.
10%	E	Coordinate and schedule court related services, including making arrangements for court reporters, witnesses, depositions, vendors and hearing rooms, etc., with specific instruction.
10%	M	Perform other administrative and clerical tasks, including but not limited to processing mail, invoices, travel expense claims, making travel arrangements, photocopying, assisting with overflow work, covering reception phones, etc. Must be able to use scanners, fax and copy machines.

[1]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
None.

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS
Knowledge of: Technical legal terms and various formatting requirements of legal documents and forms; 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, databases and other 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. Incumbent should have working knowledge of general office software to assist with the preparation of documents, filings, etc.; the Department currently uses Word and Excel and other customized database solutions that the incumbent shall be trained to use. Ability to: Use technology to simplify and streamline tasks; learn new technology techniques to enhance the job; compose correspondence independently, as directed by an attorney; demonstrate openness to new organizational structures, procedures and technology; identify and deal with issues proactively and persistently; seize opportunities that arise to solve problems; consider tasks and milestones to achieve objectives, while ensuring the optimal use of resources to meet those objectives; develop, maintain and strengthen relationships with others inside and outside of the organization who can provide information, assistance and support; provide excellent service to internal and external clients; make critical and timely decisions in difficult or ambiguous situations; ensure regular consistent communication takes place within area of responsibility; provide assistance to others when they need it; understand the interests and important concerns of others; treat others fairly and with respect and present a positive manner with clients; pursue self-development on a continual basis; be committed to improve your technical and personal growth; function effectively when under pressure; review and check the accuracy of information in work product and use punctuation and grammar properly; compose correspondence independently, as directed by an attorney; and manage time and prioritize tasks effectively.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR
The Legal Secretary's work product receives some review by either an attorney or Legal Support Supervisor I; however, attention to detail is vital as errors could result in dismissal of a court case, loss of millions of dollars, court sanctions, and/or loss of credibility with the courts, other public agencies and the public.

PUBLIC AND INTERNAL CONTACTS
The incumbent must interact with all levels of staff within the Legal Division, as well as Accounting and District Claims Officers, and will have contact with co-counsel, opposing counsel, witnesses, court personnel, government entities, litigation support.

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PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Must be able to work appropriately and effectively under stress, manage a complex and varied workload and meet multiple and competing deadlines. Must also work well with office professional and support staff, Department staff, and occasionally outside vendors.

WORK ENVIRONMENT

While at the base of operation, employees will work in a climate-controlled office under artificial light. However, due to periodic problems with heating and air conditioning, the building temperature may fluctuate.

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.)

I agree that by providing my electronic signature for this form, I agree to conduct business transactions by electronic means and that my electronic signature is the legal binding equivalent to my handwritten signature. I hereby agree that my electronic signature represents my execution or authentication of this form, and my intent to be bound by it.

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

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