STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION

POSITION DUTY STATEMENT

DOT PM-0924 (REV 01/2025)

CLASSIFICATION TITLE	OFFICE/BRANCH/SECTION	
Legal Secretary	42/LEGAL/BAY AREA LEGAL OFFICE (OAKLAND)	
WORKING TITLE	POSITION NUMBER	REVISION DATE
Legal Secretary	701-002-1282-XXX	03/02/2026

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

GENERAL STATEMENT:

Under the direction of a Legal Support Supervisor I or Supervisor I, the Legal Secretary provides secretarial support in a fast-paced legal office of the Legal Division. The Bay Area Legal Office is staffed with attorneys handling litigation and house counsel matters, investigators, paralegals, and administrative staff in the following major specialties of law: Tort, Construction Arbitration, Environmental, Contracts, Employment, Eminent Domain, Inverse Condemnation, other Real Property, legal opinions, and administrative matters. Traditionally each Legal Secretary is assigned to three to five attorneys or in a typing pool and may provide clerical support and assistance to other professional staff. Legal Secretaries may receive assignments for back-up purposes and provide assistance with overflow work. The Legal Secretary must be able to work in a team environment, have strong communication skills, work well under pressure and meet short deadlines.

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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50%	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	Responsible for maintaining, organizing and indexing case files for attorneys including pleadings, discovery, motions, correspondence, invoices, case contacts, etc. Processing travel expense claims, making travel arrangements and assisting attorneys with expert witness contract requests. Responsible for printing, bate stamping, copying, scanning, faxing, mailing, overnighting documents and/or making arrangements to have documents processed.
20%	E	Maintain calendar of court and response dates. Coordinate and schedule court-related services, including making arrangements for court reporters, witnesses, depositions, vendors and hearing rooms, etc., with specific instruction.
10%	M	Works in conjunction with other staff to ensure assigned duties are covered during absences and peak periods as assigned and assist as needed. 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

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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 vendors, and private businesses which provide services not furnished by the State.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS
Must be able to work appropriately and effectively under stress, manage complex and varied workload and meet deadlines. Must also work well with office professional and support staff, Department staff, general public and occasionally outside vendors. Ability to work on a keyboard; manual dexterity; sitting for long periods; develop and maintain cooperative working relationships; ability to focus for long periods of time.

WORK ENVIRONMENT
This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's evolving telework policy. Caltrans supports telework, recognizing that in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksites with minimum notification if an urgent need notification if an urgent need arises. The selected candidate will be required to commute to the headquartered location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquartered location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquartered location will be the responsibility of the selected candidate.

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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