

R7 Discuss and consider directing staff to create alternately staffed Legal Secretary I/II Classifications.

STAFF REPORT

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| BOARD MEETING DATE: | May 27, 2025 |
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CATEGORY: Regular Calendar 7

SUBJECT: Discuss and consider directing staff to create alternately staffed Legal Secretary I/II Classifications.

DEPARTMENT: District Attorney

SUPERVISORIAL DISTRICT #: All

DEPARTMENT CONTACT: Stephanie A. Bridgett, District Attorney, (530) 245-6300

STAFF REPORT APPROVED BY: Terri Honer, Chief Fiscal Officer

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| <u>Vote Required?</u> | <u>General Fund Impact?</u> |
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Simple Majority Vote

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| <u>Vote Required?</u> | <u>General Fund Impact?</u> |
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General Fund Impact

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| <u>RECOMMENDATION</u> |
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Discuss and consider directing staff to create alternately staffed Legal Secretary I/II Classification.

DISCUSSION

During the Fiscal Year 2024-25 Budget Hearings, the Board of Supervisors requested the District Attorney return with a presentation regarding creating a Legal Secretary I/II Classification.

Shasta County currently only offers the position of Legal Secretary. This position *“Performs difficult legal secretarial and clerical duties involving the use of considerable independent judgment; may perform routine administrative duties; composes routine memoranda, contracts, resolutions, ordinances and letters; maintains Law Library; may perform legal research; prepares legal forms necessary for filing cases before court, including briefs, motions and orders, warrants, citations, complaints, subpoenas, petitions and resolutions; answers correspondence independently; maintains calendar and schedules appointments for the manager; answers the telephone and interviews callers, exercising considerable judgment in giving out information and referring to the proper person; makes travel arrangements; installs and maintains filing systems and other clerical procedures; prepares payroll and prepares a variety of bills and invoices; opens, sorts and distributes mail; operates a variety of modern office appliances and orders office supplies as necessary; assists in budget preparation and administration; prepares financial and statistical reports; may supervise, train, and evaluate a small staff.”*

The Shasta County District Attorney’s office is requesting that Personnel create a Legal Secretary I/II Classification to differentiate duties between less experienced Legal Secretaries and those who are more tenured. The District Attorney’s office would not be the only County Department to benefit from having a two-tiered Legal Secretary Classification. The adopted Fiscal Year 2024-25 Position Allocation List approved a total of 16 FTE Legal Secretary positions as follows:

District Attorney: 8 FTE Legal Secretary
County Counsel: 2 FTE Legal Secretary-Conf.
Public Defender: 4 FTE Legal Secretary
HHSA Social Services: 2 FTE Legal Secretary

Public Defender and Public Guardian both have Legal Secretary positions in their departments and support adding the Legal Secretary I/II Classifications to the County Position Allocation List.

Legal Secretary work takes time to learn, and that knowledge is gained over the course of years. The Legal Secretary II Classification handle more complex responsibilities along with difficult cases such as homicides and high-profile cases. The

individual would possess years of experience in supporting attorneys and processing a large variety of legal documents with precise accuracy. A Legal Secretary II would be depended on to perform advanced duties under minimal supervision, allowing their supervisor more time away from constant training for new legal secretaries, whereas newer or less experienced Legal Secretaries would benefit from being trained, guided, and mentored. Building a foundation for a level II Legal Secretary could set a level I Legal Secretary on a good career path to strive for advancement and become a long time County employee, greatly adding a benefit to their department and reducing employee overturn.

Over the years, the District Attorney's office has seen turnover in staff due to being their pay being topped out within a short amount of time, turning staff to look for other jobs for more money and opportunities for advancement, putting the Department back to square one to hire a new Legal Secretary. Due to the special nature of each Department and their case management systems and duties, training a new Legal Secretary takes a long time for them to be proficient in all the roles within the office and reduces the trainer's ability to do their work.

The amount of criminal case filings continues to exceed the support staff allocated to the District Attorney's office. Comparable counties have twice the Legal Secretaries with less cases. This is another reason why Legal Secretaries leave for other jobs; they can make more money for less stressful work. Adding a level II classification not only allows for growth within the Department but also recognizes the high stress, heavier workloads and serious nature of cases that Legal Secretary IIs will handle.

The Legal Secretary position has limited growth opportunity and tops out within 4.5 years. By adding a Legal Secretary I/II Classification, Shasta County would become more competitive in the job market, and it would extend the 4.5 years of step increases, creating longevity for this position and providing the County with more experienced Legal Secretaries. Butte County, San Mateo County and El Dorado County are all examples of counties offering a tiered Legal Secretary classification.

ALTERNATIVES

The Board may choose not to receive the request or additional information. Should the Board decline to add the Legal Secretary I/II Classifications, the District Attorney's office deficient staffing allocations, heavy workload and high turnover rate, leading to delayed case processing, would remain status quo.

OTHER AGENCY INVOLVEMENT

County Counsel, Probation, Public Defender and Health and Human Services – Public Guardian are supportive.

The County Administrative Office (CAO) and Personnel do not support the additional classification for lack of distinction of job duties, concern regarding compaction with other related positions within the County, and increased costs to departments that are heavily General Funded.

Personnel and the CAO's feedback is that they are typically not supportive of providing increases to wages where there have been no changes in duties. Further, Personnel is not compelled that the addition of a II level position will provide a meaningful impact to the recruitment and retention of employees working in these positions; as proposed a 5% increase would provide only one additional year of pay increases to an employee who is at the top step of their salary range. Some positions by nature will tend to have shorter retention periods as employees look to advance their career and salaries within the County. However, should this be approved, Personnel would complete a thorough review of the current and proposed classifications, review the proposed salary structure as well as complete a salary study, and bring back to the Board a recommendation regarding appropriate pay scales for the Legal Secretary I/II Classification.

FISCAL IMPACT

The General Fund impact with adding the Secretary II Classification to the District Attorney's Office is \$34,242.54 in Salaries and Benefits, which includes compaction to the Legal Secretary Supervisor Classification. The General Fund impact to for the Public Defender's Office is \$22,954.61; Probation is \$3,924.84; and County Counsel's Office is \$8,175.87. The total General Fund Impact is \$69,297.86. Fiscal Year 2025-26 Requested budgets do not include sufficient appropriations for the added Legal Secretary I/II Classification and a budget amendment would be required.

ATTACHMENTS:

- 1: Legal Secretary Pay Schedule May 2025
2. Legal Secretary I Classification Redline
3. Legal Secretary II Classification Redline
4. Legal Secretary Supervisor Classification Redline

| Job Title | JobCode | Pay Class | Salary Schedule | Range | Monthly A Hourly A | Monthly B Hourly B | Monthly C Hourly C | Monthly D Hourly D | Monthly E Hourly E | Monthly F Hourly F |
|--------------------------------|---------|-----------|-----------------|-------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| LEGAL SECRETARY 88 | K5900 | 400 | UPEC | 406 | 3,390.00 19,558 | 3,560.00 20,536 | 3,738.00 21,564 | 3,924.00 22,640 | 4,121.00 23,774 | 4,327.00 24,962 |
| LEGAL SECRETARY/SUPVR 31,51 | K2400 | 420 | SUPV | 422 | 3,702.00 21,359 | 3,888.00 22,429 | 4,082.00 23,548 | 4,286.00 24,725 | 4,500.00 25,963 | 4,725.00 27,261 |

| Job Title | JobCode | Pay Class | Salary Schedule | Range | Monthly A Hourly A | Monthly B Hourly B | Monthly C Hourly C | Monthly D Hourly D | Monthly E Hourly E | Monthly F Hourly F |
|--------------------------------|---------|-----------|-----------------|-------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| LEGAL SECRETARY I 88 | K5900 | 400 | UPEC | 406 | 3,390.00 19,558 | 3,560.00 20,536 | 3,738.00 21,564 | 3,924.00 22,640 | 4,121.00 23,774 | 4,327.00 24,962 |
| LEGAL SECRETARY II 88 | | | UPEC | | 3,559.50 20,536 | 3,738.00 21,563 | 3,924.90 22,642 | 4,120.20 23,772 | 4,327.05 24,963 | 4,543.35 26,210 |
| LEGAL SECRETARY/SUPVR 31,51 | K2400 | 420 | SUPV | 422 | 3,737.48 21,563 | 3,924.90 22,641 | 4,121.145 23,774 | 4,326.21 24,961 | 4,543.40 26,211 | 4,770.52 27,521 |

LEGAL SECRETARY I

DEFINITION

~~Under general direction~~~~close supervision, to learn to p~~Perform ~~responsible complex~~ legal secretarial, ~~and clerical, and routine administrative~~ duties in support of an attorney with program management responsibilities, which involve active and extensive public interests and contact with other public agencies; and to perform related work as required.

DISTINGUISHING CHARACTERISTICS

~~This is the entry level class in the Legal Secretary series. Incumbents in this classification are initially assigned work of a less complex and more routine nature, increasing in complexity with time and training.~~ The class of Legal Secretary is distinguished from the Administrative Secretary class series in that while the general nature of secretarial support activities are similar, an incumbent in this class series works in a legal setting and is required to be fully proficient in all aspects of the mission of the office to which assigned. ~~It differs from a Legal Services Supervisor in that the latter has significant supervisory responsibilities in addition to secretarial duties.~~

EXAMPLES OF DUTIES

Learns and pPerforms ~~difficult the less complex~~ legal secretarial ~~and clerical~~ duties; ~~involving the use of considerable independent judgment;~~ may perform routine administrative duties; composes routine memoranda, contracts, resolutions, ordinances and letters; maintains Law Library; ~~may perform legal research;~~ prepares legal forms necessary for filing cases before court, including briefs, motions and orders, warrants, citations, complaints, subpoenas, petitions and resolutions; answers correspondence ~~independently;~~ maintains calendar and schedules appointments for ~~attorneys the manager;~~ answers the telephone and interviews callers, exercising considerable judgment in giving out information and referring to the proper person; makes travel arrangements; installs and maintains filing systems ~~and other clerical procedures;~~ ~~prepares payroll and prepares a variety of bills and invoices;~~ opens, sorts and distributes mail; operates a variety of modern office appliances; ~~prepares conference rooms for meetings; and orders office supplies as necessary;~~ ~~assists in budget preparation and administration;~~ ~~prepares financial and statistical reports;~~ ~~may supervise, train and evaluate a small staff.~~ may be called to court to assist attorneys in trial; may be called to assist in secretarial and/or clerical positions within the office; other duties as assigned.

EMPLOYMENT STANDARDS

Any combination of education and experience sufficient to directly demonstrate possession and application of the following:

Knowledge of: Legal terminology, forms, documents, and procedures; basic organization, services, programs and functions of the legal system; forms and formatting for legal documents; style/format of business correspondence, punctuation, spelling, and general English usage; modern office practices, procedures and equipment; filing, recordkeeping methods; modern office equipment; ~~basic elements of~~

~~supervision, including instructing workers on specific tasks.~~

Ability to: Perform ~~difficult and responsible~~ legal secretarial and clerical duties; ~~basic elements of supervision including instruction workers on specific tasks;~~ organize work effectively to meet critical administrative deadlines; determine office priorities; deal with deadlines and office emergencies; interpret and apply specific policies and procedures; ~~type at a speed of not less than 455 words per minute from clear copy on a typewriter or computer terminal; take dictation at a speed of 90 words per minute and transcribe it accurately may be required for certain positions;~~ compose correspondence ~~independently;~~ and establish and maintain cooperative working relationships with those contacted in the course of work.; ~~supervise the work of a small staff.~~

These standards are typically attained with ~~one to two~~ years of clerical experience preparing a wide variety of legal documents.

PHYSICAL DEMANDS AND WORK ENVIRONMENT

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. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; and talk or hear. The employee frequently is required to reach with hands and arms. The employee is occasionally required to stand; walk; climb or balance; and stoop, kneel, crouch, or crawl. The employee must frequently lift and/or move up to 10 pounds and occasionally lift and/or move up to 25 pounds.

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally exposed to outside weather conditions. The noise level in the work environment is usually moderate.

REV 8-2411-24

REV 06-99

REV 11-90

REV 11-89

REV 09-85

CS057A

LEGAL SECRETARY II

DEFINITION

~~Under general direction, to Pperform~~ difficult and responsible~~complex~~ legal secretarial, and ~~clerical, and routine administrative~~ duties in support of an attorney with program management responsibilities, which involve active and extensive public interests and contact with other public agencies; and to perform related work as required.

DISTINGUISHING CHARACTERISTICS

~~This is the journey-level class within the Legal Secretary series. This classification is distinguished from the Legal Secretary I by the level of responsibility assumed, complexity of duties assigned, and independence of action required. Incumbents are expected to perform the full range of Legal Secretary duties under minimal supervision and may be assigned as a lead worker. The class of Legal Secretary is distinguished from the Administrative Secretary class series in that while the general nature of secretarial support activities are similar, an incumbent in this class works in a legal setting and is required to be fully proficient in all aspects of the mission of the office to which assigned. It differs from a Legal Services Supervisor in that the latter has significant supervisory responsibilities in addition to secretarial duties.~~

EXAMPLES OF DUTIES

Performs ~~difficult the more complex~~ legal secretarial ~~and clerical~~ duties ~~involving the use of considerable independent judgment~~; may perform routine administrative duties; composes routine memoranda; contracts, resolutions, ordinances and letters; maintains Law Library; may perform legal research; exercises more independence in ~~preparing~~ legal forms necessary for filing cases before court; including briefs, motions and orders, warrants, citations, complaints, subpoenas, petitions and resolutions; answers correspondence independently; maintains calendar and schedules appointments for ~~the manager~~attorneys; answers the telephone and interviews callers, exercising considerable judgment in giving out information and referring to the proper person; makes travel arrangements; installs and maintains filing systems ~~and performs other more difficult secretarial/clerical procedures~~; prepares payroll and prepares a variety of bills and invoices; opens, sorts, and distributes mail; operates a variety of modern office appliances and orders office supplies as necessary; may assist in budget preparation and administration; may prepare financial and statistical reports; may supervise and/or train, and evaluate a small staff; may be called over to court to assist attorney's in trial; may be called to fill assist into any secretarialy and/or clerical positions within the office; other duties as assigned.

EMPLOYMENT STANDARDS

Any combination of education and experience sufficient to directly demonstrate possession and application of the following:

Knowledge of: Legal terminology, forms, documents, and procedures; basic organization, services, programs and functions of the legal system; forms and formatting for legal documents; style/format of business correspondence, punctuation, spelling, and general English usage; modern office practices,

procedures and equipment; filing, recordkeeping methods; modern office equipment; basic elements of supervision, including instructing workers on specific tasks.

Ability to: Perform ~~more complex and demanding difficult~~ **and responsible** legal secretarial and clerical duties; organize work effectively to meet critical administrative deadlines; determine office priorities; deal with deadlines and office emergencies; interpret and apply specific policies and procedures; ~~type at a speed of not less than 455 words per minute from clear copy on a typewriter or computer terminal; take dictation at a speed of 90 words per minute and transcribe it accurately may be required for certain positions;~~ compose correspondence ~~independently~~; establish and maintain cooperative working relationships with those contacted in the course of work; may supervise the work of a small staff.

These standards are typically attained with ~~two~~**three** ~~one (1) years of full-time experience comparable to that of a Legal Secretary I with Shasta County.s of clerical experience preparing a wide variety of legal documents.~~

PHYSICAL DEMANDS AND WORK ENVIRONMENT

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. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; and talk or hear. The employee frequently is required to reach with hands and arms. The employee is occasionally required to stand; walk; climb or balance; and stoop, kneel, crouch, or crawl. The employee must frequently lift and/or move up to 10 pounds and occasionally lift and/or move up to 25 pounds.

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally exposed to outside weather conditions. The noise level in the work environment is usually moderate.

REV 08-2411-24

REV 06-99

REV 11-90

REV 11-89

REV 09-85

CS057A

LEGAL SECRETARY / SUPERVISOR

DEFINITION

Perform complex legal secretarial and clerical duties in support of an attorney with program management responsibilities, which involve active and extensive public interests and contact with other public agencies; and to perform related work as required.

~~Under general direction, to perform responsible legal secretarial, clerical, and routine administrative duties in support of an attorney with program management responsibilities, which involve active and extensive public interests and contact with other public agencies; and to perform related work as required.~~

DISTINGUISHING CHARACTERISTICS

This is the supervisory-level class within the Legal Secretary series. This classification is distinguished from the Legal Secretary I/II by the level of responsibility assumed, complexity of duties assigned, and independence of action required. The class of Legal Secretary is distinguished from the Administrative Secretary class series in that while the general nature of secretarial support activities are similar, an incumbent in this class works in a legal setting and is required to be fully proficient in all aspects of the mission of the office to which assigned. Legal Secretary-/Supervisor has substantial supervisory responsibilities for multiple staff in addition to the usual duties.

EXAMPLES OF DUTIES

Performs difficult legal secretarial ~~and clerical~~ duties involving the use of considerable independent judgment; may perform routine administrative duties; composes routine memoranda, contracts, resolutions, ordinances and letters; maintains Law Library; may perform legal research; prepares legal forms necessary for filing cases before court, including briefs, motions and orders, warrants, citations, complaints, subpoenas, petitions and resolutions; answers correspondence independently; maintains calendar and schedules appointments for the ~~manager~~attorneys; answers the telephone and interviews callers, exercising considerable judgment in giving out information and referring to the proper person; makes travel arrangements; installs and maintains filing systems ~~and other clerical procedures~~; prepares payroll; ~~and~~ prepares a variety of bills and invoices; opens, sorts and distributes mail; operates a variety of modern office appliances and orders office supplies as necessary; assists in budget preparation and administration; prepares financial and statistical reports. ~~In other than of a routine or clerical nature, evaluates employee performance including clarifies job expectations~~, assigns work, provides feedback on performance issues, counsels employees on performance, and completes and signs ~~the annual~~ performance evaluations; and effectively recommends personnel actions such as hiring, promotion, transfer, discipline, or adjustment of grievance. May be called to court to assist attorneys in trial; may be called to assist in secretarial and/or clerical positions within the office; other duties as assigned.

EMPLOYMENT STANDARDS

Any combination of education and experience sufficient to directly demonstrate possession and application of the following:

Knowledge of: Legal terminology, forms, documents, and procedures; basic organization, services,

programs and functions of the legal system; forms and formatting for legal documents; style/format of business correspondence, punctuation, spelling, and general English usage; modern office practices, procedures and equipment; filing and recordkeeping methods; modern office equipment; basic elements of supervision, including instructing workers on specific tasks.

Ability to: Perform ~~difficult and responsible~~ legal secretarial and clerical duties; organize work effectively to meet critical administrative deadlines; determine office priorities; deal with deadlines and office emergencies; interpret and apply specific policies and procedures; ~~type at a speed of not less than 55 words per minute from clear copy on a typewriter or computer terminal; take dictation at a speed of 90 words per minute and transcribe it accurately may be required for certain positions;~~ compose correspondence independently; establish and maintain cooperative working relationships with those contacted in the course of work; supervise the work of staff.

These employment standards are typically attained with ~~two (2) one (1) years of clerical experience comparable to that of a Legal Secretary II with Shasta County. preparing a wide variety of legal documents and training or experience in supervision.~~

PHYSICAL DEMANDS AND WORK ENVIRONMENT

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. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; and talk or hear. The employee frequently is required to reach with hands and arms. The employee is occasionally required to stand; walk; climb or balance; and stoop, kneel, crouch, or crawl. The employee must frequently lift and/or move up to 10 pounds and occasionally lift and/or move up to 25 pounds.

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is occasionally exposed to outside weather conditions.

The noise level in the work environment is usually moderate.

REV ~~9/21~~11/24
CS 886 NEW 6/99 jd (CS057)