RECOMMENDED ACTION AND JUSTIFICATION:

Approve the revised Executive Secretary and Legal Secretary job descriptions, which were originally included in the first round of job descriptions prepared by HDC & Associates and have been re-reviewed by staff in accordance with direction by the Board of Supervisors. This revision reflects a substitution clause in the minimum qualifications which will coincide with the minimum qualifications contained in the Secretary job description. The substitution clause states that 30 semester units of college level coursework can be substituted for one year of experience. Although the Secretary, Executive Secretary, and Legal Secretary positions are not in a flex series, it is reasonable to have the substitution clause contained in each description.

BACKGROUND AND HISTORY OF BOARD ACTIONS:

On December 16, 2003, the Board approved the first round of job descriptions which included the accounting and clerical positions. There was a question regarding the Executive Secretary and Legal Secretary job descriptions and why there was no substitution language in the minimum qualifications section of these descriptions but there was such language in the Secretary job description. The CAO was directed to further review these descriptions and bring them back to the Board for action.

ALTERNATIVES AND CONSEQUENCES OF NEGATIVE ACTION:

N/A

Financial Impact? ( ) Yes (X) No Current FY Cost: $  
Budgeted in Current FY? ( ) Yes ( ) No ( ) Partially Funded  
Amount in Budget: $  
Additional Funding Needed: $  
Source: 
Internal Transfer 
Unanticipated Revenue 4/5's vote 
Transfer Between Funds 4/5's vote 
Contingency 4/5's vote  
( ) General ( ) Other

CLERK'S USE ONLY:

Res. No.: 14-01  
Vote – Ayes:  
Absents:  
Noes:  
Approved

Minute Order Attached ( ) No Action Necessary

The foregoing instrument is a correct copy of the original on file in this office.

Date: 
Attest: MARGIE WILLIAMS, Clerk of the Board
County of Mariposa, State of California

By: 
Deputy

COUNTY ADMINISTRATIVE OFFICER:

Requested Action Recommended
No Opinion

Comments:

CAO: [Signature]
EXECUTIVE SECRETARY

DEFINITION
To provide highly responsible secretarial support services to the head of a large County department or other comparable administrative unit; to direct and supervise the work of clerical staff as assigned; and to perform related duties and responsibilities as required.

SUPERVISION RECEIVED AND EXERCISED
Receives direction from a department head.

Exercises lead direction and/or supervision over lower-level clerical classifications.

EXAMPLES OF ESSENTIAL FUNCTIONS
Performs responsible, confidential secretarial work to support assigned department head or other County managerial staff.

Evaluates office and inter-departmental procedures and makes recommendations for modifications as necessary to maintain efficient and effective office operations.

Assists in developing and implementing office objectives, policies, procedures and work standards; maintains policy and procedure manuals.

Attends meetings as required; prepares and distributes meeting agendas and minutes.

Researches and compiles moderately complex information from a variety of sources for the completion of forms or preparation of reports.

Processes various forms, applications, permits or other documents requiring in-depth, sub-professional knowledge of the department’s functions.

Types or word processes complex and/or sensitive documents from drafts, notes, dictated tapes or brief instructions, which may include various correspondence, reports, records, forms, policy manuals, agreements, contracts, resolutions, etc.; may compose routine correspondence and reports and assist in the preparation of news releases.

Prepares agenda items for Board of Supervisor meetings.

Proofreads and checks typed and other materials for accuracy, completeness and compliance with departmental policies and regulations.

Establishes, organizes and maintains complex department filing systems.

Enters and retrieves computer data; generates computer reports and/or spreadsheets.
Schedules appointments, meetings, work activities and other functions as required.

Makes travel and lodging arrangements for supervisor, staff or visiting officials.

May provide assistance with fiscal operations of the department, including but not limited to processing accounts payable and receivable, assisting with budget preparation and monitoring, maintaining petty cash fund, and preparing financial reports as required.

May provide assistance with personnel functions of the assigned department, including but not limited to conducting orientations, maintaining employee records, processing personnel paperwork, etc.

Provides information and assistance to County staff, other agency personnel, and the public, requiring the use of judgment and the interpretation of policies, procedures or rules; assists in coordinating office activities with those of other departments and agencies as necessary.

Answers the telephone and provides information and assistance to callers or forwards calls to appropriate staff person; takes messages as necessary; greets and assists office visitors.

Performs routine clerical support work as required, which may include but is not limited to copying documents, filing / retrieving files, processing mail, faxing information, collating documents, maintaining lists and logs, ordering supplies and forms, processing daily mail, etc.

Provides training and leadership and/or supervision of assigned lower-level clerical staff; offers advice and assistance as needed; recommends disciplinary action as appropriate.

Completes special projects as assigned.

**EMPLOYMENT STANDARDS**

**Knowledge of:**

Pertinent federal, state and local laws, codes, ordinances and regulations.

County and department organization, policies and procedures.

Modern office practices and technology, including record-keeping and filing systems, receptionist / telephone techniques, business letter and report writing, and the use of computers for word and data processing.

Methods of preparing and processing various records, reports, forms and other documents peculiar to assigned department or program.

Standard office management and secretarial / clerical practices and procedures.

Basic principles of training and supervision.
County of Mariposa
Executive Secretary
Page 3

Basic business arithmetic.

Financial record-keeping and reporting methods.

English usage, spelling, grammar and punctuation.

Safe work practices.

**Ability to:**
Understand, interpret and apply pertinent federal, state and local laws, rules and regulations, and County / department policies and procedures.

Perform complex and varied clerical / secretarial work involving considerable independent judgment.

Organize work, set priorities, meet critical deadlines and follow up on assignments with a minimum of direction.

Analyze complex clerical problems, evaluate alternatives and make sound recommendations.

Provide effective supervision and training as assigned.

Communicate clearly and concisely, both orally and in writing.

Understand and execute written and oral instructions.

Compose routine correspondence and reports independently or from brief instructions.

Research and compile a variety of information and materials.

Establish and maintain effective record-keeping systems and files.

Maintain the security and confidentiality of specified records, information and files.

Use computers effectively for word and data processing and records management.

Safely operate office equipment.

Type or word process accurately at a rate required for successful job performance.

Take dictation or perform speed note taking with accuracy.

Perform required mathematical computations with accuracy.

Perform work effectively despite frequent interruptions and the pressure of deadlines.
Establish and maintain effective working relationships with those contacted in the course of work.

Respond appropriately, effectively and promptly to the needs of internal and external customers.

**TYPICAL WORKING CONDITIONS**
Work is performed in a normal office environment.

**TYPICAL PHYSICAL REQUIREMENTS**
Requires the ability to sit at a desk for long periods of time and intermittently walk, stand, stoop, kneel, crouch and reach while performing office duties; lift and/or move light weights; use hands to finger, handle or feel objects, tools or controls. Must be able to maintain effective audio-visual discrimination and perception needed for making observations, communicating with others, reading and writing, and operating office equipment. Must be able to use a telephone to communicate verbally and a keyboard to communicate through written means, to review information and enter/retrieve data, to see and read characters on a computer screen.

**MINIMUM QUALIFICATIONS**

**Experience:**
Five years of increasingly responsible secretarial experience.

**Education:**
High school diploma or GED equivalent, preferably with coursework in typing, bookkeeping and related subjects. Completion of college-level or technical coursework in secretarial studies, accounting and/or business is highly desirable.

**Substitution:**
Completion of 30 semester units of college level coursework in a related field may be substituted for one year of the required experience.

**Additional Requirements:**
Possession of a valid California driver’s license.

This class specification lists the major duties and requirements of the job and is not all-inclusive. Incumbents may be expected to perform job-related duties other than those contained in this document.
LEGAL SECRETARY I / II

DEFINITION
To perform a variety of responsible legal, secretarial and clerical functions in support of the District Attorney's Office; to prepare a variety of legal documents; and to perform related duties and responsibilities as required.

Legal Secretary I is the entry-level classification in the series. Initially under close supervision, incumbents perform a variety of legal secretarial duties while learning County policies and procedures. This classification is flexibly staffed with Legal Secretary II, and incumbents normally advance to the higher level after gaining experience and achieving proficiency which meet the requirements for Legal Secretary II.

Legal Secretary II is the journey-level classification in the series. Positions in this class perform the full range of duties and are expected to have a thorough knowledge of departmental procedures and policies and be able to exercise independent judgment while performing complex legal secretarial support work.

SUPERVISION RECEIVED AND EXERCISED
Receives general supervision from the Administrative Assistant and District Attorney, and technical direction from the Deputy District Attorneys.

EXAMPLES OF ESSENTIAL FUNCTIONS
Establishes and maintains legal case files.

Prepares, processes and files complaints, motions, petitions, declarations, orders, memoranda, dismissals, stipulations, extraditions and other legal documents as directed.

Prepares subpoenas for signature and forwards to proper agency for service; may assist in locating witnesses and serving witnesses with subpoenas.

Fulfills discovery requests from attorneys in accordance with department policies and procedures.

Prepares, processes and maintains a variety of correspondence, memos, legal forms, records and reports.

Receives and logs in police reports.

Reviews documents to ensure accuracy, completeness and adherence to prescribed format, procedures and regulations.

Monitors assigned cases, including the payment of fees and fines and completion of court orders.
Receives and screens visitors and telephone calls; provides information as requested and/or refers the visitor / caller to appropriate staff person; takes messages as necessary.

Performs criminal background checks as requested.

Assists in coordinating activities with those of other divisions, departments and agencies as appropriate.

Performs special assignments requiring research and the independent preparation of data; may assist in the preparation of grant applications.

Receives and responds to routine inquiries, requests for information and complaints.

Performs other routine secretarial / clerical work as required, including but not limited to typing correspondence and reports, speed note taking with accuracy, scheduling appointments and maintaining calendars, making travel arrangements for staff, entering computer data, completing and processing forms, copying and distributing documents, filing documents and retrieving files, sending and receiving faxes, processing mail, maintaining lists and logs, ordering office supplies, etc.

May perform Notary Public duties.

**EMPLOYMENT STANDARDS**

**Knowledge of:**

*Legal Secretary I:*

Modern office practices and technology, including filing systems, receptionist / telephone techniques, business letter and report writing, and the use of computers for word and data processing.

English usage, spelling, grammar and punctuation.

Basic arithmetic.

Legal terminology and legal office practices and procedures.

Methods of preparing and processing various legal documents.

Safe work practices.

*Legal Secretary II: (In addition to the above)*

County organization, policies and procedures.

Principles of criminal prosecution and related support practices.

Legal research methods.
Ability to:

*Legal Secretary I:*  
Learn and apply pertinent laws, rules, regulations, policies and procedures.  
Learn criminal prosecution principles and related support practices.  
Perform legal secretarial assignments.  
Organize and set priorities for a variety of projects and multiple tasks in an efficient and effective manner.  
Understand and execute written and oral instructions.  
Communicate clearly and concisely, both orally and in writing.  
Respond appropriately, effectively and promptly to the needs of internal and external customers.  
Deal tactfully and effectively with the public and with others contacted in the course of work, including hostile, irate individuals.  
Establish and maintain efficient record-keeping systems and files.  
Maintain accurate and up-to-date records.  
Maintain the security and confidentiality of specified records, information and files.  
Use computers effectively for word and data processing and records management.  
Type or word process accurately at a rate required for successful job performance.  
Take dictation or perform speed note taking with accuracy.  
Perform mathematical computations with accuracy.  

*Legal Secretary II:* (In addition to the above)  
Understand, interpret and apply pertinent laws, rules and regulations, policies and procedures.  
Use independent judgment and work with minimal supervision.  
Perform the more complex legal secretarial support duties assigned.

**TYPICAL WORKING CONDITIONS**  
Work is performed in a normal office environment.
TYPICAL PHYSICAL REQUIREMENTS
Requires the ability to sit at a desk for long periods of time and intermittently walk, stand, stoop, kneel, crouch and reach while performing office duties; lift and/or move weights of up to 25 pounds; use hands to finger, handle or feel objects, tools or controls. Must be able to maintain effective audio-visual discrimination and perception needed for making observations, communicating with others, reading and writing, and operating office equipment. Must be able to use a telephone to communicate verbally and a keyboard to communicate through written means, to review information and enter/retrieve data, to see and read characters on a computer screen.

MINIMUM QUALIFICATIONS
Experience:
Legal Secretary I:
Two years of clerical and/or secretarial experience performing work requiring the use of legal terminology and procedures.

Legal Secretary II:
Three years of increasingly responsible legal clerical / secretarial experience, or one year as a Legal Secretary I in Mariposa County.

Education: (Both Legal Secretary I and II)
High school diploma or GED equivalent.

Substitution:
Completion of 30 semester units of college level coursework in a related field may be substituted for one year of the required experience.

Additional Requirements:
Possession of a valid California driver’s license.

This class specification lists the major duties and requirements of the job and is not all-inclusive. Incumbents may be expected to perform job-related duties other than those contained in this document.
MARIPOSA COUNTY BOARD OF SUPERVISORS

MINUTE ORDER

TO: RICH INMAN, County Administrative Officer
FROM: MARGIE WILLIAMS, Clerk of the Board

SUBJECT: REVISED EXECUTIVE SECRETARY AND LEGAL SECRETARY JOB DESCRIPTIONS
Resolution No. 04-61

THE BOARD OF SUPERVISORS OF MARIPOSA COUNTY, CALIFORNIA,

ADOPTED THIS Order on February 17, 2004

ACTION AND VOTE:

Approval of the Consent Agenda (See End of the Minutes)

BOARD ACTION: Supervisor Balmain pulled items 1 and 7. Supervisor Bibby pulled item 4. (M)Stetson, (S)Bibby, the balance of the items were approved. The vote was taken after the following discussion.

Supervisor Balmain asked a possible correction to item 1 for the Legal Secretary I/II.

Supervisor Balmain initiated discussion relative to item 7 and expressed concern with waiving the insurance requirements.

Supervisor Bibby advised that she will excuse herself from voting on the second part of item 4 as the appointment is her husband.

Rich Inman, County Administrative Officer, advised that there should be a correction in item 1 for the Legal Secretary job classification.

(M)Pickard, (S)Bibby, to approve the first and third part of item 4, was withdrawn for the vote to be taken on the first motion to approve the balance of the agenda. Approval of items 2, 3, 5 and 6 - Ayes: Stetson, Balmain, Bibby, Pickard; Excused: Parker.

(M)Pickard, (S)Stetson, items 1 and 7, and the first and third part of item 4 were approved, with direction for the correction to be made to the Legal Secretary job classification in item 1/Ayes: Stetson, Balmain, Bibby, Pickard; Excused: Parker.

Supervisor Bibby excused herself from the Board for the following action. (M)Pickard, (S)Stetson, the second part of item 4 was approved/Ayes: Stetson, Balmain, Pickard; Excused: Bibby, Parker.

CA-1 Approve the Revised Executive Secretary and Legal Secretary Job Descriptions, which were Originally Included in the First Round of Job Descriptions Prepared by HDC & Associates and have been Re-Reviewed by Staff in Accordance with Direction by the Board of Supervisors (County Administrative Officer); Res. 04-61, with correction to be made in the Legal Secretary job description.
cc:  Sandi Laird, Personnel/Risk Management Technician  
    Cathi Boze, Agricultural Commissioner/Sealer  
    Bob Lowrimore, Assessor/Recorder  
    Ken Hawkins, Auditor  
    John Davis, Building Department Director  
    Debbie Walton, Child Support Services Director  
    Mary Williams, Community Services Director  
    Tom Guarino, County Counsel  
    Rick Peresan, Technical Services Director  
    Bob Brown, District Attorney  
    Gary Hickman, Farm Advisor  
    Blaine Shultz, Fire Chief  
    Charles Mosher, Health Officer  
    Cheryle Rutherford-Kelly, Human Services Director  
    Jacque Meriam, County Librarian  
    Sarah Williams, Interim Planning Director  
    Gail Neal, Chief Probation Officer  
    Jim Petropulos, Public Works Director  
    Jim Allen, Sheriff  
    Michael Berest, Court Executive Officer  
    Judie Beliera, Tourism  
    Marjorie Wass, Treasurer/Tax Collector/County Clerk  
    File