

City of San José
CLASS SPECIFICATION

Title:

Legal Analyst I FT/PT (2123/2128)
Legal Analyst II FT/PT (2120/2118)
Legal Analyst III FT/PT (2122/2125)

DEPARTMENT	ACCOUNTABLE TO	FLSA STATUS
City Attorney's Office	Varies	Non-exempt

CLASS SUMMARY

Under general supervision (Legal Analyst I) or direction (Legal Analyst II/III) performs paraprofessional legal duties that may include investigations, transactions, or litigation. Duties may include but are not limited to investigation, evaluation, negotiation, and processing of liability claims against the City and Successor Agency to the San Jose Redevelopment Agency (Successor Agency); drafting and reviewing a variety of transactional legal documents, including resolutions, ordinances, and contracts, and coordinating the collection of documents for agenda items for City Council and the Successor Agency Board of Directors; drafting a variety of discovery requests and pleadings, and preparing complex discovery documents; performs related work as required.

DISTINGUISHING CHARACTERISTICS

The Legal Analyst I/II/III is a flexibly staffed entry/journey/advanced journey class in the Legal Analyst series, described as follows:

Legal Analyst I - This is the entry level class in the Legal Analyst classification series responsible for providing paraprofessional legal and claim investigation support in the Office of the City Attorney. Positions at this level are not expected to function with the same amount of knowledge or skill level as positions allocated to the Legal Analyst II level and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work continues to be supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. As experience is gained, assignments become more varied and are performed with greater independence.

Legal Analyst II - This is the journey level class in the Legal Analyst classification series responsible for performing the full range of paraprofessional legal and claim investigation support in the Office of the City Attorney. Incumbents are expected to work independently and exercise judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. Legal Analyst II is distinguished from Legal Analyst I in that they may provide training to a Legal Analyst I and/or clerical staff.

Legal Analyst III - This is the advanced journey-level class in the Legal Analyst series responsible for performing a full range of paraprofessional legal and claim investigation support in the Office of the City Attorney. Incumbents regularly work on tasks that are varied and complex, requiring considerable discretion and independent judgment. Positions in this classification rely on experience and judgment to ensure the efficient and effective functioning of the assigned program area. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver work products. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements. Legal Analyst III is distinguished from Legal Analyst I/II in that they may provide training to a Legal Analyst I/II and/or clerical staff. This class differs from the Senior Legal Analyst classification in that Senior Legal Analyst incumbents perform paraprofessional legal

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duties and/or claims investigation work of the most complex nature and serve in a supervisory capacity, and perform other management and administrative work.

QUALIFICATIONS

(These qualifications are typically required. An equivalent combination of education and experience sufficient to satisfactorily perform the duties of the job may be substituted.)

Minimum Qualifications

Education and Experience

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Legal Analyst I

A Bachelor's Degree from an accredited college or university AND three (3) years of increasingly responsible investigations or paralegal experience performing investigations, processing liability claims, OR researching and preparing legal documents such as discovery documents, pleadings, contracts, ordinances, or resolutions.

Legal Analyst II

A Bachelor's Degree from an accredited college or university AND five (5) years of increasingly responsible investigations or paralegal experience performing investigations, processing liability claims, OR researching and preparing legal documents such as discovery documents, pleadings, contracts, ordinances, or resolutions.

Legal Analyst III

A Bachelor's Degree from an accredited college or university AND six (6) years of increasingly responsible investigations or paralegal experience performing investigations, processing liability claims, OR researching and preparing legal documents such as discovery documents, pleadings, contracts, ordinances, or resolutions that are varied and complex.

Acceptable Substitution

- An Associate's Degree OR 60 semester units/90 quarter units from an accredited college or university AND additional years of increasingly responsible investigations or paralegal work experience may be substituted on a year for year basis for up to two (2) years of the education requirement.
- Completion of a Paralegal program, including possession of a Paralegal Certificate, may be substituted for one (1) year of the required experience OR one (1) year of the education requirement.

Required Licensing (such as driver's license, certifications, etc.)

Possession of a valid State of California driver's license.

Other Qualifications

(Incumbents may be required to have different combinations of the listed qualifications, or more specific job-related qualifications depending on the position.)

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Basic Competencies

(Demonstrates general knowledge needed at entry into the job in order to perform the essential duties.)

- Job Expertise - Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations.
- Communication Skills - Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills and displays openness to other people's ideas and thoughts.
- Computer Skills - Experienced with common business computer applications including but not limited to: MS Outlook, MS Word, MS PowerPoint, MS Access, and MS Excel.
- Teamwork & Interpersonal Skills - Develops effective relationships with co-workers and supervisors by helping others accomplish tasks and using collaboration and conflict resolution skills.
- Analytical Thinking – Approaching a problem or situation by using a logical, systematic, sequential approach.
- Decision Making – Identifies and understands issues, problems, and opportunities; uses effective approaches for choosing a course of action or developing appropriate solutions.
- Flexibility - Makes effective decisions and achieves desired results in the midst of major changes in responsibilities, work processes, timeframes, performance expectations, organizational culture, or work environment.
- Initiative – Exhibits resourceful behaviors toward meeting job objectives; anticipates problems, is proactive, and avoids difficulties by planning ahead; displays willingness to assume extra responsibility and challenges; pursues continuing education opportunities that promotes job performance.
- Problem Solving – Approaches a situation or problem by defining the problem or issue; determines the significance of problem; collects information; uses logic and intuition to arrive at decisions or solutions to problems that achieve the desired outcome.
- Reliability - Completes quality work assignments in a timely and efficient manner; fulfills responsibilities and maintains confidentiality as appropriate.

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DUTY NO.	TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:	FREQUENCY*
General		
1.	Participates in and coordinates the collection, analysis, organization and summarization of a wide variety of information, materials, documents, reports and evidence.	Daily
2.	Responds to citizen complaints and inquiries.	Daily
3.	Performs legal and/or general research utilizing online resources, document management systems, and print materials; research may include contacting other external agencies and organizations.	Daily
4.	Reviews data and documents, and identifies relevant, confidential, sensitive, privileged, and/or protected information; may redact appropriate data and maintains document logs.	Daily
5.	May provide training to lower level staff by assigning, reviewing and providing feedback on tasks.	As Required
6.	Performs other related duties as assigned.	As Required
Investigations		
7.	Investigates and evaluates definite and potential claims against or by the City and Successor Agency for damage and/or injury relating to auto and general liability.	Daily/Several Times
8.	Performs investigation, including preparation of trial exhibits and service of subpoenas, witness location and/or interviews, asset searches, data analysis.	Daily
9.	Negotiates claims with insurance carriers, opposing counsel, and claimants in settling claims within prescribed limits.	Daily
10.	Represents the City and testifies in small claims court; files court documents.	Intermittent
Transactions		
11.	Reviews, edits, and drafts resolutions, contracts, leases, loan documents, permits, public bid and construction documents, policies and other legal documents and instruments.	Daily/Several Times
12.	Drafts, processes and tracks Office contracts from initial draft through final execution.	Daily
13.	Coordinates the collection of City Council and Successor Agency Board agenda items for the legislative process.	Daily
14.	Tracks and monitors Successor Agency projects.	Weekly
15.	Maintains and updates Office Law Library and other research materials.	Intermittent
Litigation		

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16.	Reviews case information; drafts a variety of legal documents, including various pleadings, form complaints, and declarations; prepares discovery documents; prepares trial exhibits; files court documents and other pre/post-trial tasks as assigned.	Daily
17.	Provides case management and trial support for a variety of litigation matters.	As Required

*Frequency defined as Daily/Several Times, Daily, Weekly, Intermittent, or As Required

PHYSICAL/ENVIRONMENTAL ELEMENTS

The following is a general statement for the classification. Individual positions may have additional or different physical/environmental elements.

In an office environment, possess ability to:

- Operate, access, enter, and retrieve data using standard office equipment, including but not limited to a computer or tablet;
- Read printed materials and a computer screen;
- Communicate in person and over the telephone;
- Lift, carry, push, and pull materials and objects up to 25 pounds, or heavier weights, in all cases with the use of proper equipment;
- Move between/within work areas, including but not limited to sitting, walking, and standing on various surfaces, turning, bending, grasping, and making repetitive hand movements;
- Be exposed to moderate noise levels and controlled temperature conditions;
- Maintain professional demeanor during interactions with staff, customers, and the public.

CLASSIFICATION HISTORY Created in 2/80 (Formerly Litigation Analyst I), Rev. 9/80, Rev. 2/83, Rev. 2/86, Rev. 6/90, (Formerly Legal Assistant I), Established II in 1/91, Rev. & Ret. 1/91 (Formerly Legal Assistant II), II PT class added in 8/92, I PT class added 9/92, Rev. & Ret. 1/98 (Formerly Litigation Assistant I/Litigation Analyst II), PT Legal Analyst I/II added in 9/03, Rev. 11/03, Rev. 9/18, 3/20 (added Legal Analyst III); s006