

2023 CITY OF SAN JOSÉ – MEF NEGOTIATIONS  
TENTATIVE AGREEMENT

**CITY PROPOSAL – LEGAL ADMINISTRATIVE ASSISTANT SERIES  
CLASSIFICATION SPECIFICATION REVISIONS**

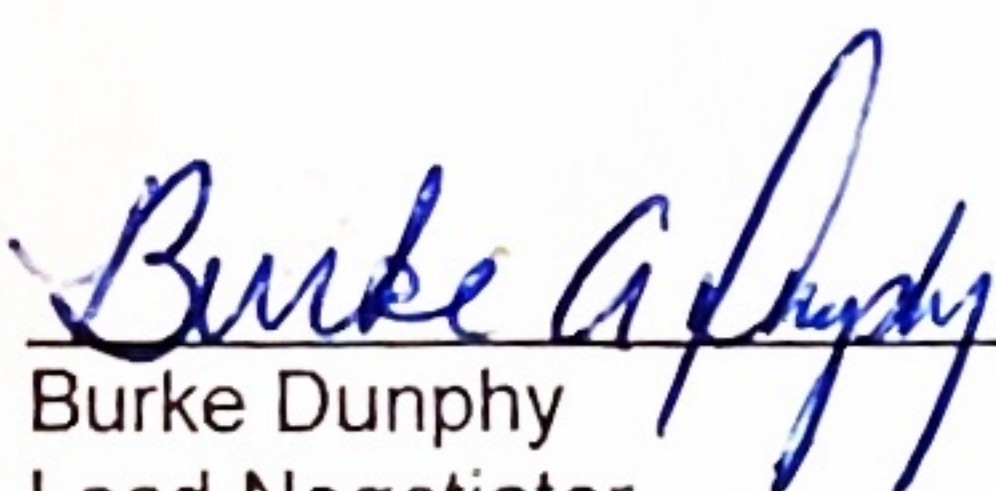
On March 15, 2023, the City provided the attached proposed classification specification revisions for the Legal Administrative Assistant series to MEF for review. These revisions were drafted in coordination with the City Attorney's Office for reasons, including, but not limited to addressing recruitment and retention issues.

MEF responded on March 24, 2023, citing Article 3.1.4 of the MEF Memorandum of Agreement (MOA), and indicated that MEF was not interested in meeting and conferring on these proposed classification specification revisions outside of negotiations on a successor MOA. The City disagrees with MEF's interpretation of Article 3.1.4 of the MEF MOA and reserves the right to dispute MEF's interpretation in the future. Nonetheless, while the City believes that these classification specifications could be efficiently addressed outside of successor MOA negotiations, as other similar issues have in the past, the City is proposing these changes at the successor MOA negotiation table at MEF's request.

Attachment – Legal Administrative Assistant Series Classification Specification Revisions

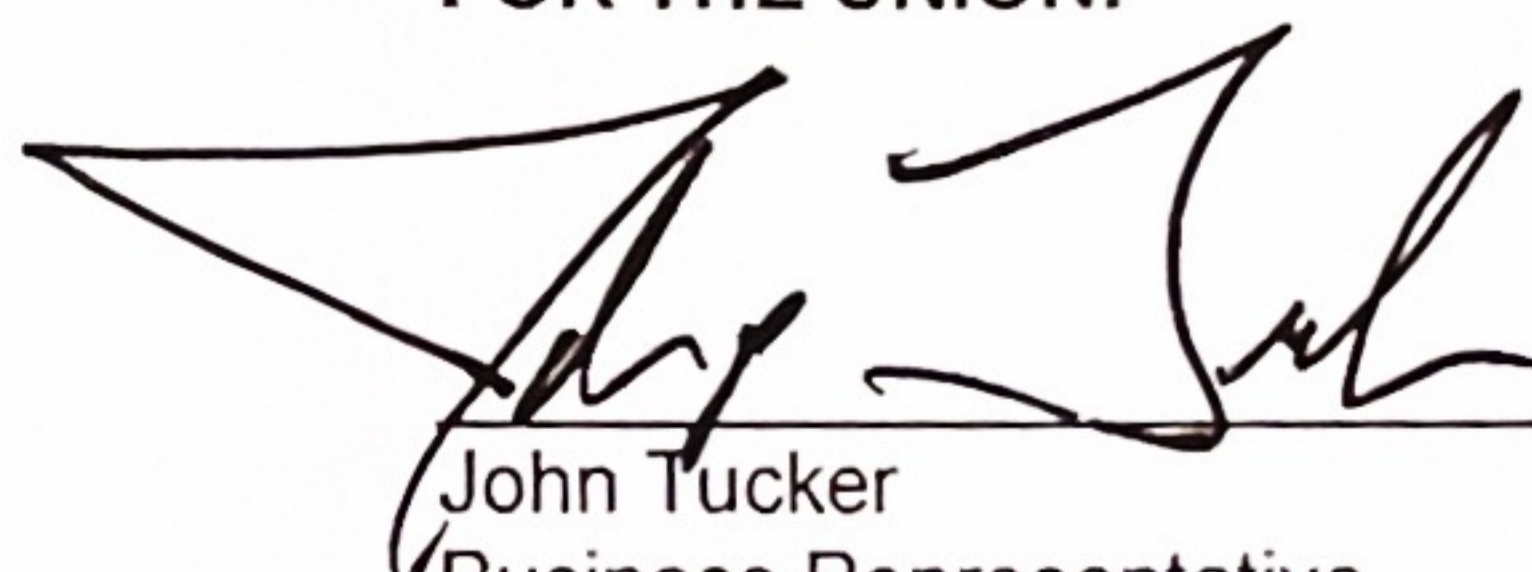
*\*This agreement is considered tentative and shall not be considered final or binding until a final agreement on all terms has been reached and both ratified by union members and approved by City Council.*

FOR THE CITY:

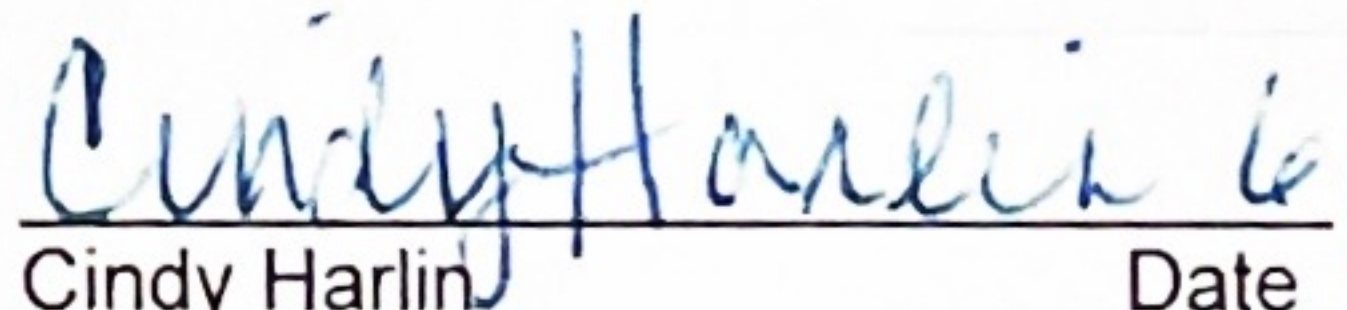
  
Burke Dunphy  
Lead Negotiator  
City of San José

6/7/23  
Date

FOR THE UNION:

  
John Tucker  
Business Representative  
AFSCME, Local 101

6/7/23  
Date

  
Cindy Harlin  
President  
MEF, AFSCME, Local 101

6/7/23  
Date



**City of San José**  
**CLASS SPECIFICATION**

**Title: Legal Administrative Assistant I/II/III FT/PT**  
**(1167/1153/1168/1154/XXXX/XXXX)**

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

**CLASS SUMMARY**

Under immediate (Legal Administrative Assistant I) to general supervision (Legal Administrative Assistant II/III) performs a variety of legal administrative assistant duties within the Office of the City Attorney; drafts, proofreads, and reviews legal materials to ensure conformance to standard legal and office style and accuracy, including accuracy of citations and code references; identifies applicable procedural rules and statutes; performs work related to a variety of legal matters; serves as contact person in answering inquiries and complaints, providing information related to the Office of the City Attorney. Performs related work as required.

**DISTINGUISHING CHARACTERISTICS**

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

Legal Administrative Assistant I – This is the first working level class in the Legal Administrative Assistant series responsible for providing administrative support within the Office of the City Attorney. Positions at this level are not expected to function with the same knowledge or skill level as positions allocated to the Legal Administrative Assistant 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 Administrative Assistant II - This is the journey level class in the Legal Administrative Assistant series responsible for performing the full range of legal administrative support duties within 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 Administrative Assistant III - This is the advanced journey-level class in the Legal Administrative Assistant series responsible for providing the full range of legal administrative support duties within the Office of the City Attorney. Positions at this level rely on experience and judgment to ensure the efficient and effective completion of tasks. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to operating procedures and policies of the work unit. Legal Administrative Assistant III is distinguished from Legal Administrative Assistant I/II in that they may provide training to lower level staff by assigning, reviewing and providing feedback on tasks.

**QUALIFICATIONS**

**Minimum Qualifications**

**Education and Experience**

***Legal Administrative Assistant I***

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND two (2) years of experience in legal administrative assistant work preparing and formatting legal documents such as pleadings, briefs, contracts, ordinances, resolutions or other transactional documents.

**City of San José**  
**CLASS SPECIFICATION**

**Title: Legal Administrative Assistant I/II/III FT/PT**  
**(1167/1153/1168/1154/XXXX/XXXX)**

***Legal Administrative Assistant II***

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND three (3) years of experience in legal administrative assistant work preparing and formatting legal documents such as pleadings, briefs, contracts, ordinances, resolutions or other transactional documents.

***Legal Administrative Assistant III***

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND four (4) years of experience in legal administrative assistant work including two (2) years of experience in Civil Litigation practice utilizing on-line legal software to create Table of Authorities, preparing and formatting complex legal documents such as correspondence, pleadings, briefs, contracts, ordinances, resolutions or other transactional documents.

**Other Qualifications**

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

**Basic Competencies**

**(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.
- Customer Service - Demonstrates the ability to anticipate customers' needs and deliver services effectively and efficiently using professional demeanor.
- 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.
- Multi-Tasking – Can handle multiple projects and responsibilities simultaneously; has handled a wide variety of assignments in past and/or current position(s).



**City of San José**  
**CLASS SPECIFICATION**

**Title: Legal Administrative Assistant I/II/III FT/PT**  
**(1167/1153/1168/1154/XXXX/XXXX)**

- Planning – Acts to align own unit's goals with the strategic direction of the organization; Defines tasks and milestones to achieve objectives, while ensuring the optimal use of resources to meet those objectives.
- 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.

DUTY NO.	<b>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:</b>	FREQUENCY*
1.	Performs administrative support duties for attorney and other staff, such as screening visitors and calls; processing and distributing mail; arranging schedules; maintaining attorney's appointments, departmental, and litigation calendars and reminders; and handling travel-related details.	Daily/Several Times
2.	Prepares, proofreads, and reviews materials such as legal papers, contracts, amendments, ordinances, resolutions, discovery, pleadings and court documents to ensure accuracy of dates, clarity of wording and language, conformance to standard legal style, consistency between clauses and/or provisions, verification of accuracy of citations and code references through use of the law library and various websites, and completeness of all appropriate supporting documentation; notes necessary changes, additions, deletions, and corrections for review and approval by an attorney or supervisor.	Daily/Several Times
3.	Drafts and formats a variety of legal and general documents on a word processor; composes correspondence, memoranda and other material from verbal instruction, or independently as appropriate; utilizes a document management system.	Daily/Several Times
4.	Works with various software applications as they relate to the preparation and filing of legal and other documents; operates standard office machines and equipment.	Daily/Several Times
6.	Prepares and updates the confidential Closed Session agenda and Brown Act required documents.	Daily/Several Times
7.	Serves as contact person in answering inquiries and complaints from multiple sources; forwards inquiries, complaints and messages to appropriate staff for action; provides information related to the work of the Office to the public, law firms, courts, and various City, County, State, Federal, other public and private agencies/entities; routinely obtaining information as requested or needed.	Daily

City of San José  
**CLASS SPECIFICATION**

**Title: Legal Administrative Assistant I/II/III FT/PT  
 (1167/1153/1168/1154/XXXX/XXXX)**

DUTY NO.	<b>TYPICAL CLASS ESSENTIAL DUTIES:</b> (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*
8.	Performs work related to a variety of legal matters such as: discovery, tables of contents and points of authorities, tort claims and litigation, personnel matters, code enforcement, eminent domain, contracts, appropriations, taxes, land use, general plan, zoning; political activities, community development and various other categories of legal work; researches and identifies applicable procedural rules and statutes.	Daily
9.	Provides assistance upon request and/or coordinates with other Legal Administrative Assistants in the Office; and participates in the orientation and various trainings on specific position to other office staff. Assists in the development of office procedures as requested.	Daily
10.	Performs other related duties as assigned.	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** (Formerly titled *Legal Secretary I/ II*), Created 5/80, Rev. 1/83, Rev. 1/84, Rev. 7/90, Rev. 7/98, Rev. 09/03, Rev. 09/18, Rev. & Ret. 12/18 (Formerly *Legal Administrative Assistant I/II C*); s005, Rev. XX/23; s006.



City of San José  
CLASS SPECIFICATION

**Title: ~~Legal Administrative Assistant Trainee (1165)~~  
Legal Administrative Assistant I/II/III FT/PT  
(1167/1153/1168/1154/XXXX/XXXX)**

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

### CLASS SUMMARY

Under immediate (~~Legal Administrative Assistant Trainee and~~ Legal Administrative Assistant I) to general supervision (Legal Administrative Assistant II/III) performs a variety of legal administrative assistant duties within the Office of the City Attorney; drafts, proofreads, and reviews legal materials to ensure conformance to standard legal and office style and accuracy, including accuracy of citations and code references; identifies applicable procedural rules and statutes; performs work related to a variety of legal matters; serves as contact person in answering inquiries and complaints, providing information related to the Office of the City Attorney. Performs related work as required.

### DISTINGUISHING CHARACTERISTICS

The ~~Legal Administrative Trainee~~/Legal Administrative Assistant I/II/III is a flexibly staffed ~~trainee~~ entry/journey class in the Legal Administrative series, described as follows:

~~Legal Administrative Assistant Trainee – This is the trainee level class in the Legal Administrative Assistant series responsible for providing administrative support within the Office of the City Attorney by learning the diverse tasks, policies, procedures and document preparation standards within the department. Work is highly supervised while in progress and fits an established structure or pattern. This class is distinguished from the higher level class of Legal Administrative Assistant I in that the incumbents of that class have learned department operations, procedures and standards and perform the more routine legal document preparation. This class is distinguished from classes in the Office Specialist series in that the incumbents of that series perform general clerical work, whereas incumbents of this class perform specialized work involving the use of legal terminology and procedures.~~

Legal Administrative Assistant I – This is the ~~second and~~ first working level class in the Legal Administrative Assistant series responsible for providing administrative support within the Office of the City Attorney. Positions at this level are not expected to function with the same knowledge or skill level as positions allocated to the Legal Administrative Assistant 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 Administrative Assistant II - This is the journey level class in the Legal Administrative Assistant series responsible for performing the full range of legal administrative support duties within 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 Administrative Assistant III - This is the advanced journey-level class in the Legal Administrative Assistant series responsible for providing the full range of legal administrative support duties within the Office of the City Attorney. Positions at this level rely on experience and judgment to ensure the efficient and effective completion of tasks. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to operating procedures and policies of the work unit. Legal

City of San José  
CLASS SPECIFICATION

**Title: ~~Legal Administrative Assistant Trainee (1165)~~  
Legal Administrative Assistant I/II/III FT/PT  
(1167/1153/1168/1154/~~XXXX/XXXX~~)**

Administrative Assistant III is distinguished from Legal Administrative Assistant I/II in that they may provide training to lower level staff by assigning, reviewing and providing feedback on tasks.

## QUALIFICATIONS

### Minimum Qualifications

#### **Education and Experience**

#### ***Legal Administrative Assistant Trainee***

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND ~~experience equivalent to two (2) years of responsible experience in stenographic (transcription or word processing) and clerical work, preferably with one (1) year of experience having been acquired in a law office.~~

#### ***Legal Administrative Assistant I***

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND ~~experience equivalent to one-two (+2) years~~ of experience in legal administrative assistant work preparing and formatting legal documents such as pleadings, briefs, contracts, ordinances, resolutions or other transactional documents.

#### ***Legal Administrative Assistant II***

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND ~~experience equivalent to three (3) years of experience in legal administrative assistant work including one (1) year of preparing and formatting complex~~ legal documents such as pleadings, briefs, contracts, ordinances, resolutions or other transactional documents.

#### ***Legal Administrative Assistant III***

Completion of high school or equivalent (General Education Development [GED] Test or California Proficiency Certificate) AND ~~four (4) years of experience in legal administrative assistant work including two (2) years of experience in Civil Litigation practice utilizing on-line legal software to create Table of Authorities, preparing and formatting complex legal documents such as correspondence, pleadings, briefs, contracts, ordinances, resolutions or other transactional documents.~~

#### ***Acceptable Substitution***

#### ***Legal Administrative Assistant Trainee***

~~A certificate and/or degree in legal secretarial studies or related field, or an Associate's Degree from an accredited college may be substituted for one (1) year of responsible experience stenographic (transcription or word processing) and clerical work.~~

#### **Other Qualifications**

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

#### **Basic Competencies**

(Needed at entry into the job in order to perform the essential duties.)



City of San José  
CLASS SPECIFICATION

**Title: ~~Legal Administrative Assistant Trainee (1165)~~  
Legal Administrative Assistant I/II/III FT/PT  
(1167/1153/1168/1154/XXXX/XXXX)**

- 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.
- Customer Service - Demonstrates the ability to anticipate customers' needs and deliver services effectively and efficiently using professional demeanor.
- 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.
- Multi-Tasking – Can handle multiple projects and responsibilities simultaneously; has handled a wide variety of assignments in past and/or current position(s).
- Planning – Acts to align own unit's goals with the strategic direction of the organization; Defines tasks and milestones to achieve objectives, while ensuring the optimal use of resources to meet those objectives.
- 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.



City of San José  
CLASS SPECIFICATION

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**(1167/1153/1168/1154/XXXX/XXXX)**

DUTY NO.	<b>TYPICAL CLASS ESSENTIAL DUTIES:</b> (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*
1.	Performs administrative support duties for attorney and other staff, such as screening visitors and calls; processing and distributing mail; arranging schedules; maintaining attorney's appointments, departmental, and litigation calendars and reminders; and handling travel-related details.	Daily/Several Times
2.	Prepares, proofreads, and reviews materials such as legal papers, contracts, amendments, ordinances, resolutions, discovery, pleadings and court documents to ensure accuracy of dates, clarity of wording and language, conformance to standard legal style, consistency between clauses and/or provisions, verification of accuracy of citations and code references through use of the law library and various websites, and completeness of all appropriate supporting documentation; notes necessary changes, additions, deletions, and corrections for review and approval by an attorney or supervisor.	Daily/Several Times
3.	Drafts and formats a variety of legal and general documents on a word processor; composes correspondence, memoranda and other material from verbal instruction, or independently as appropriate; utilizes a document management system.	Daily/Several Times
4.	Works with various software applications as they relate to the preparation and filing of legal and other documents; operates standard office machines and equipment.	Daily/Several Times
6.	Prepares and updates the confidential Closed Session agenda and Brown Act required documents.	Daily/Several Times
7.	Serves as contact person in answering inquiries and complaints from multiple sources; forwards inquiries, complaints and messages to appropriate staff for action; provides information related to the work of the Office to the public, law firms, courts, and various City, County, State, Federal, other public and private agencies/entities; routinely obtaining information as requested or needed.	Daily
8.	Performs work related to a variety of legal matters such as: discovery, tables of contents and points of authorities, tort claims and litigation, personnel matters, code enforcement, eminent domain, contracts, appropriations, taxes, land use, general plan, zoning; political activities, community development and various other categories of legal work; researches and identifies applicable procedural rules and statutes.	Daily
9.	Provides assistance upon request and/or coordinates with other Legal Administrative Assistants in the Office; and participates in the orientation and various trainings on specific position to other office staff. Assists in the development of office procedures as requested.	Daily
10.	Performs other related duties as assigned.	As Required



City of San José  
CLASS SPECIFICATION

**Title: ~~Legal Administrative Assistant Trainee (1165)~~  
Legal Administrative Assistant I/II/III FT/PT  
(1167/1153/1168/1154/XXXX/XXXX)**

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- 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** (Formerly titled *Legal Secretary I/ II*), Created 5/80, Rev. 1/83, Rev. 1/84, Rev. 7/90, Rev. 7/98, Rev. 09/03, Rev. 09/18, Rev. & Ret. 12/18 (Formerly *Legal Administrative Assistant I/II C*); s005, Rev. XX/23; s006.