

POSITION DUTY STATEMENT

PM-0924 (REV 02/2021)

CLASSIFICATION TITLE Senior Legal Analyst	OFFICE/BRANCH/SECTION 42/LEGAL - SAN DIEGO	
WORKING TITLE Senior Paralegal	POSITION NUMBER 701-004-5333-XXX	EFFECTIVE DATE 03/28/2022

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

GENERAL STATEMENT:

The Senior Legal Analyst is the most experienced paralegal who provides high level assistance to Caltrans Legal management. Under the general supervision of an Assistant Chief Counsel, and under the general direction of an attorney, the Senior Legal Analyst regularly and independently performs the full range of the most responsible, varied and complex paralegal duties which are analytical in nature, and provide consultative services to management and attorneys, in the following areas of law, including but not limited to, tort, construction arbitration, employment, eminent domain, environmental, real property, contract, and transportation.

CORE COMPETENCIES:

As a Senior Legal Analyst, 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. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity)
- **Ethics and Integrity:** Demonstrated concern to be perceived as responsible, reliable, and trustworthy. Respects the confidentiality of information or concern shared by others. Honest and forthright. Conforms to accepted standards of conduct. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity)
- **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. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity)
- **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. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity)
- **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. (Cultivate Excellence - Engagement, Equity, Innovation, Integrity)

TYPICAL DUTIES:

Percentage	Job Description
Essential (E)/Marginal (M) ¹	

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50%	E	Under direction of an attorney who shall accept full responsibility for the tasks performed, the Senior Legal Analyst (in the areas of civil litigation, administrative proceedings and transactional work) in the most complex cases:
		Assists in designing and conducting investigations/research for legal issues, identifies issues of concern for investigations/research, interviews witnesses and gathers documentation. Assists in designing, conducting, responding (objections and/or factually) and analyzing discovery (Interrogatories, Production of Documents, Requests for Admissions, Deposition Notices, subpoenaed documents, etc.), identifies issues of concern for discovery, interviews witnesses and gathers documentation. Researches and analyzes statutory and case law authority relating to specific issues (especially those with direct impact on Caltrans) and makes recommendations concerning handling of the issues. Drafts various pleadings (complaints, answers, motions, expert disclosures, etc.) and subpoenas. Summarizes and categorizes deposition transcripts. Analyzes and summarizes trial evidence.
		Assembles trial binders and exhibits. Drafts jury instructions (CACI and special). Analyzes and summarizes expert witness statements. Coordinates with experts for Independent Medical Exams, depositions and trial testimony.
		Creates hardcopies and/or computerized systems for gathering, tracking and managing litigation information, discovery documents and/or other documents used by the Caltrans Legal Division. Assists in the presentation of materials outside of the Caltrans Legal Division. May assist attorney in preparing witnesses for depositions and trial testimony. May assist attorney in identifying expert witnesses and/or preparing expert witnesses for depositions and trial testimony.
		Special Requirement: Proficient in Microsoft Office (Outlook, Excel and Power Point) and Adobe Pro. Proficient Caltrans Legal Division's software and databases.
25%	E	Analyzes statutory and regulatory authority, prepares analyses of legislation and regulations, and may draft legislation and regulation proposals for the Caltrans Legal Division, monitors progress of legislation and regulations.
15%	E	May assist attorney in trial and/or administrative proceedings in the most complex cases. Attends training and conferences with approval.
10%	M	May serve in a lead capacity over other paralegals (Legal Analyst). May develop paralegal training material and train other paralegals (Legal Analyst); develops strategies and proposals to rectify problem areas. Work with management and attorneys on other job related duties as required.

¹ESSENTIAL 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: Basic legal concepts, terminology, principles and procedures; use of legal reference materials; role of a paralegal staff in a legal office.

Ability to: Reason logically; analyze situations accurately and recommend an effective course of action; write effectively; prepare reports and summary sheets which set forth a statement of the facts, applications of relevant law and conclusions; read and understand statutes, court decisions, legal documents and similar material; prepare drafts of pleadings; draft litigation discovery documents, such as interrogatories and motions; work cooperatively with attorneys, clerical staff, technical staff and the general public. Demonstrated ability to act independently, to communicate effectively both verbally and in writing, and to assume increased responsibility.

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RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The Senior Legal Analyst independently prepares letters and memoranda under his/her signature and is responsible for their content. Most legal documents are reviewed and signed by the lead attorney, who is ultimately responsible for their content; however, 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 consult with all levels of staff in the Legal Division and other administrative programs; have a wide variety of contacts with court staff, judges, departmental staff, private industry, and other governmental agency representatives; and outside witnesses.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Must be able to work appropriately and effectively under stress, manage complex and varied workload and meet deadlines. 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. Requires occasional bending, stooping and kneeling.

WORK ENVIRONMENT

While at their base of operation, employees will work in a climate-controlled office under artificial light. However, due to periodic problems with the heating and air conditioning, the building temperature may fluctuate. Will have to perform work duties in different court rooms throughout the state and therefore, this position does require travel.

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.)

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